Adult Contacts - New and Open

The workflow steps **Adult Contact (New Case)** and **Adult Contact (Open Case)** both contain the same form (Adult Contact), but if you select the wrong type of contact, you will not have the correct next actions available to you in **Section 7. Next actions**.

> You will only be able to record an **Adult Contact (New Case)** if you have sufficient permissions to do so.
>
> Adult Care area practitioners and managers will not be able to record an **Adult Contact (New Case)** as in most circumstances workflow should continue from a review.

To record a contact, enter the person's record and select **Adult Contact (New Case)** or **Adult Contact (Open Case)**, as appropriate, from the **Start > New …** sidebar menu.

> **Unsure which contact to use:**
>
> Check **Current work** on the **Person summary** screen to see if the case is already open.
>
> There should be an assessment or review assigned to an Adult Care team/team member (including LPFT, Hospital, and Review but not OT) for the case to be classed as **open**.

Tips for completing the form

Click the **Save** icon throughout your recording in the form. It is recommended that you save your work at least at the end of each section, but the more often the better. Once you click save, any mandatory fields will be highlighted in red.

Information will prepopulate into the fields marked with the **blue cog** . If some information is missing or incorrect, it can be edited by:

- clicking the **Show subject summary** icon to minimise the workflow step window
- editing the information on the **Person summary** screen (user guides on updating the person's details can be found on the **Mosaic Hub**)
- maximising the workflow step window and clicking the **Refresh current form** icon to update the information in these fields

For further guidance on completing a workflow step refer to the **Working with Workflow Steps and Forms** user guide.

> This guide will only cover fields where we can specify an answer or where there is something specific to highlight.

In **Section 1. Details of person making the contact** to record details of the **Person making the contact**, click the **Find** button and use the appropriate tab to search for the person, worker or organisation.

Important: The **Manual Input** button should only be used as a last resort. If a person is not known in Mosaic they should be created (Refer to the **Creating a Person** user guide for further details). For an unknown worker or organisation contact the Mosaic Service Desk so they can create them.

In **Section 3. Details of Current Situation** for the question **Is the contact on an open case?** select the appropriate answer from the dropdown menu.

If you select **Yes** an additional mandatory question will display: **Is a review required?**

If you select **Yes** to this question another mandatory question will display: **Who will undertake the review?**

Use the onscreen prompt to help select the correct option - the answer you select from the dropdown menu for this question will prompt you to record the correct next action in **Section 7. Next actions.**

You should only answer **Yes** to the question **Is the contact for an immediate service?** if urgent services (to start within 48 hours) are required.

Section 4. Consent links to the answer given in the **Source of the contact** question in **Section 1.**

In **Section 6. Completion Details** you will have to update the time within the **Date** field if prompted to do so (if time is before the time in the **Date and time of contact** in **Section 1**). To do this, click the **date and time** picker icon and click the **'Now'** button.

Next actions

Next actions are mandatory in all forms so at least one next action must be added in **Section 7** before the contact can be finished.

To record a next action:

- Click the **Add** button
- Select the relevant action from the **'Select action'** dropdown menu
- Tick the **'Send Immediately?'** checkbox where necessary (only available for certain actions)
- Assign to = Select/Find as appropriate - Not required for NFA (no further action) actions
- Reason = Select an appropriate reason (only available for certain actions)
- Note = Record any necessary information – recommended when assigning a next action to another team/worker
- Priority = Select radio button as appropriate – use the 'Note' field to explain why you have changed the 'Priority' from 'Normal' if you change it
- Click the **Add** button if more than one next action is required or click the **Add and close** button if only adding one next action or once all actions are added

Action	Contact available from	When to use	Who to assign to
Adult OT Conversation Record	Both	If it is a contact for OT involvement	**Adult OT Duty** team using Pass to team dropdown menu
Adult Conversation Record	New	If it is a contact for Adult Social Care involvement and CSC are not completing a telephone assessment	Relevant team using Pass to team dropdown menu
Adult Conversation Record – CSC	New	If it is a contact for Adult Social Care involvement and CSC are conducting initial conversations to determine how to progress.	**Serco Care and Wellbeing Hub** using Pass to team dropdown menu Can also be assigned to Self using **Assign to Me** button.
Adult My Assessment: Non-Area Team	New	For hospital avoidance cases only	Self using **Assign to Me** button Or the relevant team using Pass to team dropdown menu
Adult Carer Contact to be Recorded on Carer's Record (NFA)	Both	If the person's carer requires a carers assessment and this was highlighted during the contact **Important:** When selecting this action, you must go to the carer's record and record an **Adult Contact (Carers)** to refer to the Carers Team.	This is a terminating (no further action) action, so does not need to be assigned.

Action	Contact available from	When to use	Who to assign to
Adult Immediate Emergency Services Request	Both	If the person requires urgent services and there is no time to complete a needs assessment. An appropriate reason must be selected when adding this action.	Self using **Assign to Me** button
Adult Referral to Reablement (assign to self)	Both	If the person requires a referral to home based reablement service (Libertas) You should tick **‘Send Immediately?**’ when adding this action.	Self using **Assign to Me** button
Adult Referred to ILT (NFA)	Both	If the person has been referred to ILT	This is a terminating (no further action) action, so does not need to be assigned
Adult Referral to Wellbeing (assign to self)	Both	If the person requires screening for the Wellbeing Service	Self using **Assign to Me** button
Adult Referral to LPFT Mental Health Social Care (assign to self)	Both	If the person needs transferring to LPFT (Lincolnshire Partnership Foundation Trust) for Mental Health Social Care intervention You can tick **‘Send Immediately?**’ when adding this action.	Self using **Assign to Me** button
Adult Mental Health Act Assessment	Both	If the person requires a Mental Health Act Assessment	The **Approved Mental Health Professionals (AMHP)** team using Pass to team dropdown menu

Action	Contact available from	When to use	Who to assign to
Adult Information and Advice Provided (NFA)	Both	If the outcome of the contact is purely providing information and advice	This is a terminating (no further action) action, so does not need to be assigned
Adult Request for Access to Records	Both	If the contact is for a Subject Access Request	**SARs Team** using Pass to team dropdown menu
Adult Referral to Other Agency	Both	If the person needs to be referred to an external agency (one that does not use Mosaic)	Self using **Assign to Me** button
Adult Referral to LSS (NFA)	Both	If the person has been referred to the Lincolnshire Sensory Service	This is a terminating (no further action) action, so does not need to be assigned.
Adult Referred to DoLS (NFA)	Both	If the contact is for a DoLS case. Add an Organisational relationship for DoLS Team of 'Involved Team' Send the information via e-mail to mentalcapacityresource@lincolnshire.gov.uk	This is a terminating (no further action) action, so does not need to be assigned.

Action	Contact available from	When to use	Who to assign to
Adult Complete/Update Carer Emergency Response Plan	Both	**To be used by CSC (Out of Hours) and EDT only** If the contact is for a carer who needs an emergency response plan to be created / updated. Workers from other teams should record **Adult Contact (Carer)** on the **carer's record** and then add this action from the carer contact	**Adult Carers Service – Inbox** using Pass to worker dropdown menu Or **Carers First** using Pass to team dropdown menu
Adult Appropriate Adult Referral to TAAS (NFA)	Both	If the contact is from the police asking for an Appropriate Adult. You need to contact the Call Handling Team at TAAS by telephone to make the referral – 0333 2424999.	This is a terminating (no further action) action, so does not need to be assigned.
Adult CHC Monitoring	Both	To be recorded when the contact is a request attendance at a CHC review	Relevant Adult Care or LPFT Team using Pass to team dropdown menu
Adult Start Care Programme Approach	New	To be used where the Care Programme Approach needs starting on a record You can tick **'Send Immediately?'** when adding this action.	Relevant LD or LPFT Team using Pass to team dropdown menu
Adult Telecare (Palliative Care Only)	Both	**To be used by CSC only** If the person is in palliative care/end of life circumstances and require telecare equipment	Self using **Assign to Me** button

Action	Contact available from	When to use	Who to assign to
Adult No Further Action Required	Both	If no further action is required following the contact, but a full case closure cannot be completed or is not needed	This is a terminating (no further action) action, so does not need to be assigned
Adult Risk Assessment and Management Plan	Open	If there are high or severe risks which need a risk assessment	Self using **Assign to Me** button
Adult Equipment Repair and Replace (NFA)	Open	If the person requires a repair or replacement of existing equipment	This is a terminating (no further action) action, so does not need to be assigned
Adult Change in Care Package Delivery Request	Open	If an episode of rolling respite (previously costed for) needs recording. If you are selecting this step for other reasons, it should be recorded as a next action from a review, not a contact	Self using **Assign to Me** button
Adult Financial Assessment Referral (assign to self)	Open	If there has been a change in financial circumstances but no change in need or the care package You can tick **'Send Immediately?'** when adding this action.	Self using **Assign to Me** button
Adult Start Scheduled Review Process (Assign to Serco Care and Wellbeing Hub)	Open	To be used when the contact being recorded highlights the need for a telephone review. An appropriate reason must be selected when adding this action.	**Serco Care and Wellbeing Hub** using Pass to team dropdown menu

Action	Contact available from	When to use	Who to assign to
Adult Start Review Process on an Open Care (NFA)	Open	To be used by acute hospital workers for admission avoidance (front door referral) cases.	This is a terminating (no further action) action, so does not need to be assigned.
Adult Bring Forward Scheduled Review (Assign to Area Team)	Open	To be used when the contact being recorded highlights the potential need for review activity by Area. An appropriate reason must be selected when adding this action.	Relevant Key Team using Pass to team dropdown menu
Adult Bring Forward Scheduled Direct Payment Audit	Open	To be used when a direct payment audit needs to be completed early (before it is due)	**Customer Finance Audit Team** using Pass to team dropdown menu
Adult End Services – Equipment or Professional Support	Open	For cases where there are telecare or professional support services that need ending	Self using **Assign to Me** button for ending professional support **Adult Telecare** using Pass to team dropdown menu to request Telecare services are ended.
Adult Proposed Case Closure	Open	If a full case closure is required, i.e. the contact is to inform us of a reason for closure such as death or person leaving the area Refer to the **Case Closures – Full, Team and Involvement** guide for further information	Self using the **Assign to Me** button

Action	Contact available from	When to use	Who to assign to
Adult Case Closure Already Started (NFA)	Open	If a full case closure is required and is already underway To add this action, you must be able to see **Adult Proposed Case Closure** or **Adult Case Closure in Progress** within **Current work** on the **Person summary** screen	This is a terminating (no further action) action, so does not need to be assigned

Toolbar Icons

Before finishing your contact you should always consider whether you need to use any of the toolbar icons at the top of the screen.

For example, you may need to complete one of the optional forms available via the **Forms and letters** icon .

You should use the **View documents**) icon (0) to attach relevant supporting documents created outside of Mosaic.

You must consider if you need to send a request or notification via the **Requests** icon .

Request (R) / Notification (N)	When to use	Who to assign to
(R) Adult Please review information and authorise	Optional authorisation.	Your manager using the Pass to worker > Find button
(R) Adult Please action	This request appears in most workflow steps and can be used as / where required	Another worker or team as appropriate using the Pass to worker/team > Find button

Request (R) / Notification (N)	When to use	Who to assign to
(N) Adult OPG 100 search	**Contact (Open Case) only.** Sent to request an Office of Public Guardian (OPG) search or to notify Adult Care Finance of the outcome of an OPG search.	**Adult Care Finance** using Pass to team dropdown menu

Clicking the **Finish** icon will finish and complete your contact.

The contact cannot be finished if there are any incomplete mandatory fields or if there are any requests which need completing.

If the **Finish** icon is clicked while there are outstanding mandatory sections, a system message will display explaining the form cannot be finished as "mandatory items" are outstanding.

Once the **Finish** icon can be clicked, it will lock down your contact and no further input can be made.