

## Adults Quick Guide

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### Creating a Person

In Mosaic, 'people' are members of the public, including customers/clients and their friends, family and neighbours.

To create a person you must first search for them in Mosaic:

- Click the **Find person** button (**Full workview**) or **People > Find person** (main header menu in **Narrow** or **Closed workview**) to start a person search

The **Find person** window displays

Please refer to the **Searching for a Person, Worker or Organisation** user guide for further details on performing a person search.

- Enter search criteria

#### Important notes:

- Searches can only be conducted if information is entered in at least **one** of the fields marked **#**
- A minimum of **2 characters** must be recorded in one of these (mandatory) fields before a search can be performed
- Less is more when performing a person search – only enter one type of search criteria at a time when searching i.e. just first and last name or just date of birth
- The **% wildcard** can be used when searching for a person but it is not a necessity
- If searching by '**Other reference**' (for example NHS number), then the '**Reference type**' must also be selected from the dropdown menu

- Click the **Find** button – search results will display

You should click the **Find again** button to search using different search criteria if the person you are looking for is not listed in the results.

To prevent the creation of a duplicate record a person search will need to be performed using a **minimum of three different search criteria** before creating a new person.

Once you are sure the person does not already exist you can create them:

- From the search results window, click the **Add new** button
- Enter person's details in the **Add new person** window

#### **Important notes:**

- Fields marked \* are mandatory when creating a person in Mosaic
- To minimise the risk of creating duplicate records, as much relevant information as possible should be recorded when creating a person
- Ensure you have **capital letters** at the beginning of the first and last names – Mosaic will not do this for you
- The information in this screen can be recorded or updated later, once the person is created, as required – see the **Basic Details** user guide for further guidance
- If **Date of birth** has been recorded, **age** defaults in
- **Gender** can be recorded to indicate the person's identified gender – if not recorded, this will match the **Sex (as per Health system)** on the Person summary screen
- **Sex (as per Health system)** should indicate how the person was born
- **Context** defaults in if the **Date of birth** or **age** has been entered

- **Sub ethnicity** becomes mandatory when an **Ethnicity** has been recorded and the list filters based on the ethnicity selected

A person cannot be created without recording an address.

- Click the **Next >>** button

To perform an address search at least one field marked # is required – please refer to the **Addresses** user guide for further details on how to search for and record a person's address, including the **Other details** section.

If the person's address is unknown or not found in Mosaic, or the person has no fixed abode, the person can still be created by entering **xxx xxx** into the 'Post code' field, selecting the **Search through all addresses in UK** checkbox and clicking the **Find address** button.

The **Find address** list window will display - select **Unknown Address** or **No Fixed Abode** as appropriate.

For cases where the person is created with '**Unknown Address**', this should only be a temporary address.

The correct address should be obtained and recorded as soon as possible

For cases where the address is recorded as '**Unknown Address**' because the address is not found in Mosaic, the person's record must be created and then the **Add Address** form should be submitted to request that Mosaic Service Desk add the missing address to the person's record

You can also add the person's telephone number(s) while creating them.

- Click the **Add telephone number** button

The **Add telephone** popup window displays

## Important notes:

- **Telephone number type** and **Telephone number** are both mandatory
- The **Note** field can be used to record a short note about the telephone number e.g. 'Only call after 9.00am'
- Click the **OK** button

The **Add telephone number** button can be used to add additional telephone numbers if required.

Any telephone numbers not recorded during the person creation, recorded incorrectly or that need to be updated can be added or edited later as required. Please see the **Contact Details – Telephone Numbers and Email Addresses** user guide for further details.

Click the **Finish** button to complete the person creation – the **Person summary** screen for the person you have created will display.

It is also possible to search for and create people within another person's record i.e. when adding a personal relationship. Please see the **Personal Relationships** user guide for further guidance on this process.

### Person Posing a Risk

If the person you are creating is a person identified as posing a risk, you must record a **Note** identifying them as such on their record.

You must use a note category of **B: Warning** and include any relevant information in the Note text field. This information can include details obtained from sources such as the Police or Safeguarding teams.

#### Do not:

- Record a note advising the person poses a risk on any record but their own.
- Use any of the three note categories beginning **C: Person posing risk**. These are only to be used by the appropriate Children's Services teams.