

## Purchasing a Deep Clean

This guide is for setting up a new Deep Clean provision on Mosaic, through a purchasing step. In practice, a Cleaning provider will already have been sourced and budget/ costs agreed.

The Mosaic process of purchasing a Deep Clean, in summary:

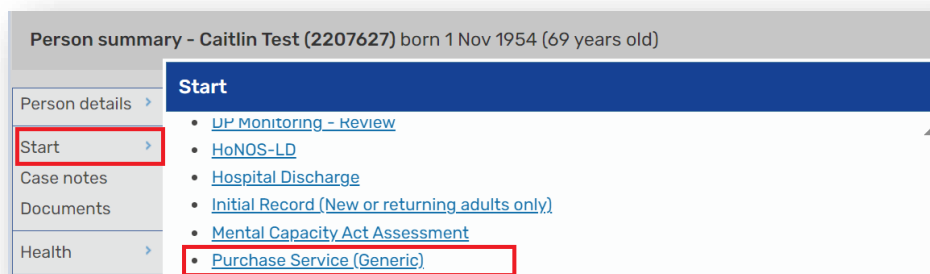
- Open a Purchase Service (generic) workflow step
- Add the Cleaning provision under the Provision and Contributions tab
- Add an element (cost) to that Cleaning provision
- Send an authorisation task to your manager
- Selecting a next action and finishing this step

### Opening a Purchase Service (Generic) workflow step

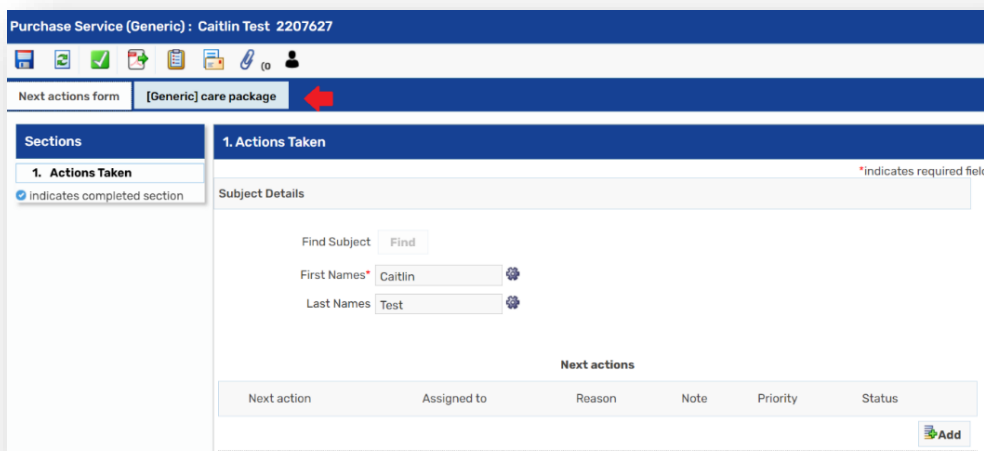
You will generate a Purchase Service (Generic) step, from 'Start' and 'New' on the individual's main page or this can be generated as an action from your Three Conversation workflow.

If you are generating the deep clean purchasing action from a workflow step, you will select Purchase Services (Deep Clean)- it's the same step, but renamed for ease- and as the practitioner, you will assign this to yourself as you are completing this process.

- Click on Start and select Purchase Service (Generic).



- When you first open this step, you will see two tabs. The 'Next actions form' tab can be completed at the end. To start the purchasing of a deep clean, you need to click on the '(Generic) care package' tab:



Purchase Service (Generic) : Caitlin Test 2207627

Next actions form [Generic] care package

Sections

1. Actions Taken

Indicates completed section

Subject Details

Find Subject Find

First Names\* Caitlin

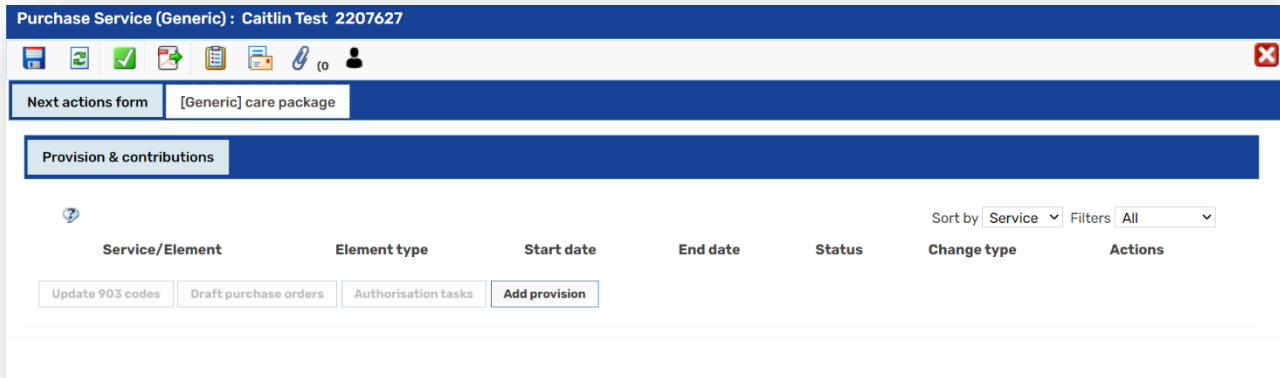
Last Names Test

Next actions

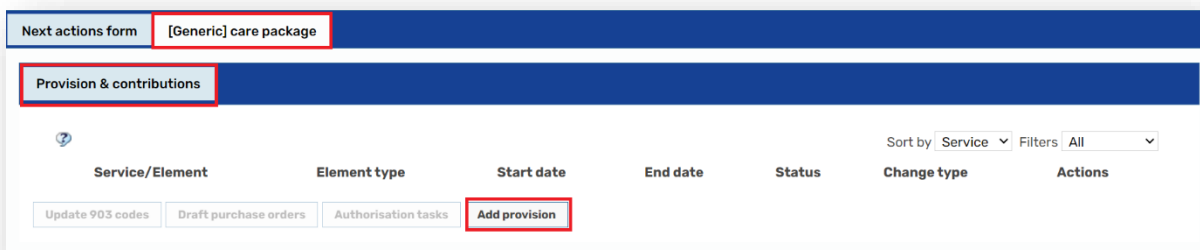
Next action	Assigned to	Reason	Note	Priority	Status
Add					

## Add the Cleaning provision under the Provision and Contributions tab

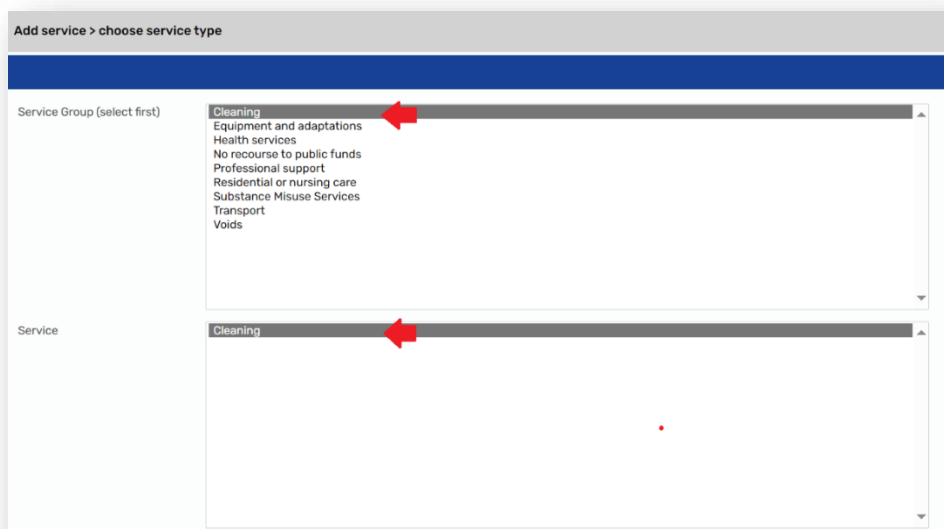
- Select the **Provision & Contributions tab** and you will see the following.



- To add a provision, select **Add Provision**.



- Choose 'Cleaning' from the Service Group list, and then choose 'Cleaning' again under *Service*:



- Select **OK**.

- Fill in the relevant information, in relation to the Cleaning service you are setting up under the following highlighted tabs:

New Cleaning > Change Standard Settings for Service

Summary	Dates	Purchaser	Provision	Allocated party	Budget codes
<b>Dates</b>	Start date:		Planned end date:		
<b>Purchaser</b>	Worker responsible for purchase:		Efoawan Glover		
	Purchasing team:				
<b>Provision</b>	Service band:		Supplier:		
<b>Allocated party</b>	Allocated person:				
<b>Budget codes</b>	Budget codes:		Cost Centre - Subjective -		

- **Dates:** Put the start date of the Deep Clean in, as agreed with the Cleaning company.
  - **Purchaser:** This is you the practitioner, so under 'Purchasing Team', ensure the correct team is detailed e.g. Access and Response, ASC Neighbourhoods, CLDS Integrated Team and ASC Hospital Team RFH/SPRU/UCLH.
  - **Provision:** Select from the **Service Band** (Basic, Enhanced, Full) and **Supplier**.
  - **Allocated party:** This is the person managing the Cleaning. This could be the individual or a nominated person. Under 'Person', select 'Find' and find the person to add here.
  - **Budget Codes:** Choose a budget code from the drop down (if presented with an ACM Personal Budget or an ACM Generic, choose ACM Generic).
- If you click on the first tab, **Summary**, your page should now look like the following:

New Cleaning > Change Standard Settings for Service

Summary	Dates	Purchaser	Provision	Allocated party	Budget codes
<b>Dates</b>	Start date:			28/12/2023	
	Planned end date:				
<b>Purchaser</b>	Worker responsible for purchase:	Efoawan Glover			
	Purchasing team:	ASC Neighbourhoods			
<b>Provision</b>	Service band:	Basic			
	Supplier:	Clearup Solutions Limited			
<b>Allocated party</b>	Allocated person:	Caitlin Test			
<b>Budget codes</b>	Budget codes:	Cost Centre - SA247 ACM Generic Over 65 Subjective -			

- Then select '**OK**'.



## Add an element (cost) to the Cleaning provision

- Once you have clicked OK, you will be brought to the provision page, where you will notice an incomplete element. This relates to the one-off Cleaning cost, which we haven't yet stated. To add a cost, we click on the pencil to amend the element:

**New Cleaning**

Service group: Cleaning      Service: Cleaning

Note:

Elements in this Service	Start date	End date	Status	Change type	Actions
Deep Clean	28/12/2023	28/12/2023	Incomplete Element	New	 


Cost (one-off) : £0.00 for 1 unit

Change Standard Settings    Add Element

OK    Cancel

- Now within the element, you can see that there is missing cost shown as **REQUIRED**, under the 'Delivery' tab.

**New Cleaning > New Deep Clean**

Summary	Dates	Purchaser	Provision	Delivery	Budget codes	Note	Payments
<b>Dates</b>	Start date:						28/12/2023
<b>Purchaser</b>	Worker responsible for purchase:						Efoawan Glover
	Purchasing team:						ASC Neighbourhoods
<b>Provision</b>	Service band:						Basic
	Supplier:						Clearup Solutions Limited
<b>Delivery</b>	Frequency:						Once
	Quantity:						1.00
	Standard total cost:						£0.00
	Overridden total cost:						<b>REQUIRED</b> 
<b>Budget Codes</b>	Budget Codes:						Cost Centre SA247 ACM Generic Over 65
							Subjective JH009 Spot Home Care
<b>Payments</b>	Method of payment:						Via Corporate System
	Payee:						Supplier


- Select the 'Delivery' tab at the top:
  - Under **Quantity**, leave the default quantity as 1, since this is a one-off cost. There is no quantity so to speak with a Deep Clean.
  - In **Overridden Total Cost**, put in the one-off cost agreed for the Cleaning service. (Note, the 'Recalculate' button has been disabled as this is for a variable rate).

New Cleaning > New Deep Clean

Summary	Dates	Purchaser	Provision	Delivery	Budget codes	Note	Payments
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Fields marked with a \* are required before the service can be purchased.


Frequency \*

Quantity \*  

Standard Unit Cost £

Standard Total Cost £

Have you changed the quantity?


Overridden Total Cost £  




- Once you have added in the relevant information under the 'Delivery' tab, then select '**OK**' which will bring you back to the main provision page again.

You can see your element has now been amended and displays the hours (unit)/ costs that you have entered. If you've made any errors, you can amend again using the pencil icon, or delete it using the 'x' icon:

New Cleaning

Service group: Cleaning Service: Cleaning

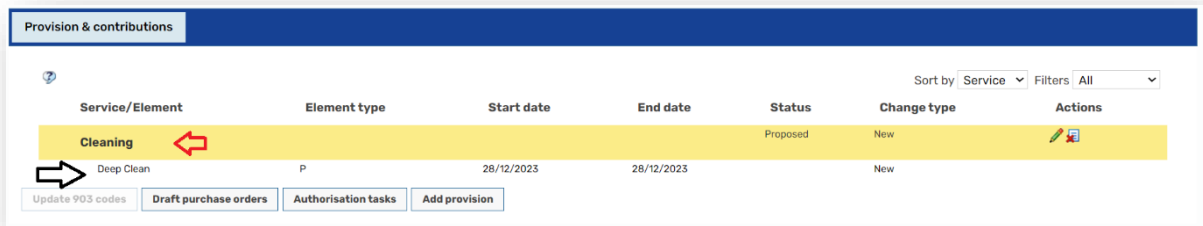
Note  

Elements in this Service	Start date	End date	Status	Change type	Actions
Deep Clean	28/12/2023	28/12/2023		New	 
Cost (one-off) : £500.00 for 1 unit 					

You can also use the 'Note' text box available above to put any additional Cleaning details if needed.

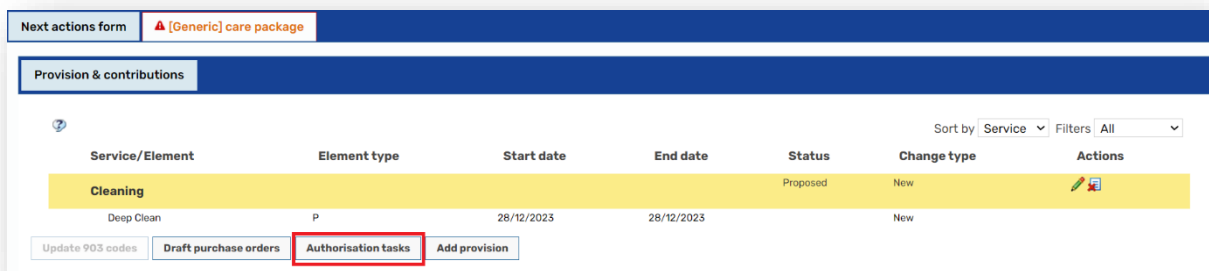
- Select '**OK**' to return to the main page.

You can see the Cleaning provision you added (the yellow bar) and the element you added to that (the white line underneath). If you do not see both of those lines of information, then you know this has not been added correctly:

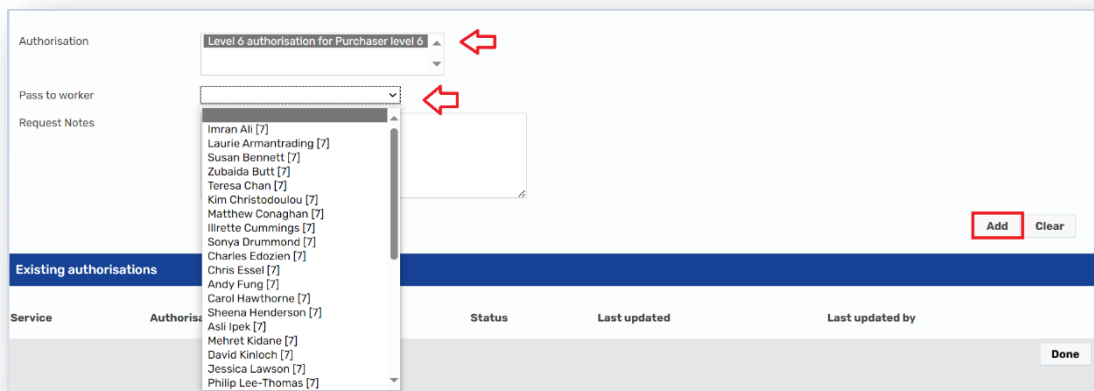


## Send an authorisation task to your manager

- You now need to send your Cleaning provision for authorisation.



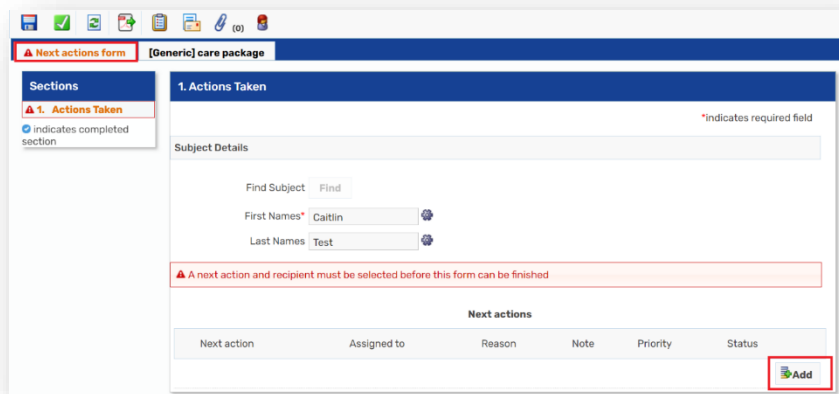
- Select the 'Authorisation Tasks' button (highlighted above) to send a request to your manager for authorisation (if this button is greyed out/ unavailable, then it means there was an existing current budget that has already been agreed, and an authorisation in this step is not required).
- Ensure you click on 'Level 6 authorisation for Purchaser level 6', to enable the managers drop-down list to appear. Choose your manager in 'Pass to worker'.



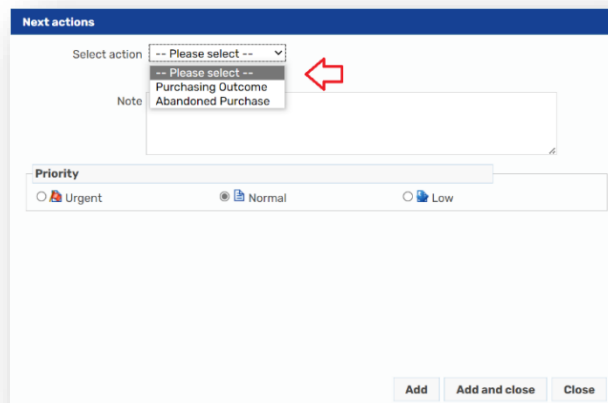
- Once added, select 'Done'.
- You now must 'Save and close' this workflow step, until your manager has authorised.


## Selecting a next action, and finishing this step

- Once your manager has authorised the task, you need to ‘Resume’ the Purchase Service (Generic) workflow step.
- On the ‘Next actions form’ tab, select ‘Add’:



- You will see two drop-down options available. To complete this step and ensure the Cleaning is set up, select **Purchasing Outcome**. To abandon this step, as if you never created it (if opened in error for instance), choose **Abandoned Purchase**:



- Then ‘Add and Close’
- Finally, you must **FINISH** this workflow step, using the green tick icon  in the toolbar and then click Ok. Without finishing this step, the Cleaning will not be in place.
- Once the finish icon has been selected, the step will generate a Purchase Order (PO). It’s not necessary for you to keep, but you can send it to supplier if required.
- On the individual’s front screen, you can now see the Cleaning provision in place:

