



Mosaic Group Working
User Guide

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What is a Mosaic group?

A group is a collection of two or more people within Mosaic. Simple!

Why create groups in Mosaic?

To take advantage of the benefits that Mosaic group working affords which includes the following:

- It provides the ability to record workflow simultaneously against the subject children in Children's social care
- It can also make possible a more comprehensive understanding of a case.

Note: It is possible to create a group with only one member but there are no benefits to this different from that which is available on the current person summary record. *Except where it is done in anticipation of/preparatory to adding future members of the family to the group.*

What is a subgroup?

Where information is recorded against a sub-set of group members. The sub-set is known within Mosaic as a **subgroup**. For example, a work step or case note can be recorded against two out of the six children within a family group. The two children constitute a subgroup.

Types of Groups

In Mosaic it is possible to have several group types.

Given the range of possible group types, Mosaic allows the creation of any group types that are required to allow each customer (LA) to create groups appropriate to their local requirements. Examples of group types include:

- Family Group
- Workflow Group

Creating Groups

There are two main ways of creating groups within Mosaic

- From an existing/newly created person record
- Directly within a workflow step/form ([see Appendix](#))

Family groups are usually created when contact is made with the Service and Mosaic records are created for child/young person and their family.



Group membership and group working is identified throughout Mosaic by the group working icon.

Create a group from a child/young person's record

1. From the side menu on the Person Summary screen, chose the **Groups** menu item and **Create group**.

Person summary - Test Test (2075012) born 19

Person details >

Start

Case notes

Documents

Events

Visits

Education >

Health >

Looked after >

Legal status

Offences

Registrations

Alerts history

Child protection history

Financial assessment results

File management >

External system administration

Restrictions

Groups >

Create group

Warnings

Richard
[Change](#)

Demographic information

Address

Main address 121 Abbey Rd
London
NW6 4SL ([View](#))
Authority: Ca
Ward: Kilburr
Cluster team
serve this ad
[Person has c
addresses...](#)

Basic details

Context Child

Date of birth Born 19 Aug
2019 (2 years
old)

2. You are prompted to supply the group **Title**, **Description** and **Type** in the *Create dialog box*.

Create

Fields marked with a * are required

Title * Grouppy

Description James and John

Type *

Carer Family Workflow Group

OK Cancel

Click **OK** to create group.

NOTE

Naming Convention:

Title – Use the Last name(s)


Description – Use the first name of each group member


Type – *Family*

Treat 'Description' field as mandatory.


- Once a group has been created, a **Group Summary record** is created and displayed. Showing the **Group Title** and **Description** and **Type**.
A **Group record ID** is assigned and displayed on the Group Summary record **Edit Group Title** and/or **Description** by clicking on their respective 'Green pencil'.



Home

Family Details - Grouppy (145018) 


James and John 


Summary | **Personal relationships** | **Professional relationships** | **Case notes** | **Documents**

Family Search: 



ID	Name	Date of birth	Gender	Start date	Actions
2192437	John Grouppy	04/07/2010 (12 years old)	Male	28/07/2022	 

Showing 1 to 1 of 1 entries First Previous 1 Next Last

Address(es) 

Current work 

John Grouppy

The Parade  
 10 Watford High Street
 WD17 1AA ([View map](#))

No current work

Create a group directly within a workflow step/form

See Appendix for details

Add other family members to a group



Add other group members by clicking the add button on the *Group Summary record* This will display the 'Find Person' dialog box.

Home

Family Details - Grouppy (145018)

James and John

Summary | **Personal relationships** | **Professional relationships** | **Case notes** | **Documents**

Family Search: -

ID	Name	Date of birth	Gender	Start date	Actions
2192437	John Grouppy	04/07/2010 (12 years old)	Male	28/07/2022	

Showing 1 to 1 of 1 entries First Previous 1 Next Last

Address(es)

Current work

John Grouppy

The Parade
10 Watford High Street
WD17 1AA ([View map](#))

No current work

Find person

At least one field marked with a # is required
The presence of the space character in Post Code will affect search results

Last name# Use 'sounds like' for last name

First name(s)

Flat no. Building name#

House no. Street name#

Post code#

Date of birth# Age from Age to

Person reference#

Context
 Adult Child Both

Gender
 Male Female Any

Other reference#

Reference type

Class

Use one or more mandatory search criteria to find other people to add to the group. Where more than one person is returned in a search, it is possible to add several at once using the check boxes along the right-hand side.

Select all appropriate persons
Click **Add Selected** to add them to the group.

Find person

Find person results

Searched for: Last name: **Grouppy**

Show entries Search:

ID	Name	Address	Date of birth	<input type="checkbox"/>
2192436	James Grouppy	The Parade, 10 Watford High Street, WD17 1AA	04/07/2010	<input checked="" type="checkbox"/>
2192437	John Grouppy	The Parade, 10 Watford High Street, WD17 1AA	04/07/2010	<input type="checkbox"/>
2192438	Zebedee Grouppy	10 The Parade High Street, Watford, WD17 1AA	10/09/1991	<input checked="" type="checkbox"/>

Showing 1 to 3 of 3 entries

NOTE

The check box beside the name of a person returned in the search will be disabled/greyed out for one of two reasons and Mosaic provides a tooltip stating which.

- Person is already part of the group
- Person is restricted from you

2118398	Fif Test	1 YORK WAY, LONDON, N1 9AQ	30/04/1999	<input type="checkbox"/>
2186157	Louise Test	Bidborough House, 20 Mabledon Place, London, WC1H 9BF	06/06/2016	<input checked="" type="checkbox"/>

You cannot add a person restricted from you. Please contact the system administrator for more details.

2118398	Fif Test	1 YORK WAY, LONDON, N1 9AQ	30/04/1999	<input type="checkbox"/>
2186157	Louise Test	Bidborough House, 20 Mabledon Place, London, WC1H 9BF	06/06/2016	<input checked="" type="checkbox"/>
2138434	Mark Test	Flat 33 Park View House, Goldington Street, London, NW1 1UG	22/12/1968	<input type="checkbox"/>

Already a member

Once all the appropriate people have been added to the group, the *Group Summary Record* looks like this:

Family Details - Grouppy (145018)

James and John

Summary | Personal relationships | Professional relationships | Case notes | Documents

Family Search:

ID	Name	Date of birth	Gender	Start date	Actions
2192436	James Grouppy	04/07/2010 (12 years old)	Male	31/07/2022	
2192437	John Grouppy	04/07/2010 (12 years old)	Male	28/07/2022	
2192438	Zebedee Grouppy	10/09/1991 (30 years old)	Male	28/07/2022	

Showing 1 to 3 of 3 entries First Previous 1 Next Last

Address(es) **Current work**

Zebedee Grouppy

10 The Parade High Street
Watford
WD17 1AA ([View map](#))

James & John Grouppy

The Parade
10 Watford High Street
WD17 1AA ([View map](#))

No current work

Additional information can then be recorded about the group, including workflow, professional relationships, case notes, and documents.

If a person is already a member of a group, there will be a link to this group on the person summary record. There will also be a second item in the Groups menu called **View History**.

Person summary - Primrose Test (2192390) born

Person details > Summary Case history

Start
Case notes
Chronologies
Documents
Events
Visits
Education >
Health >
Looked after >
Consent
Legal status
Offences
Registrations
Alerts history
Child protection history
Financial assessment results
File management >
External system administration
Restrictions
Groups >

Demographic information

Address

Main address 218A Eversh
London
NW1 1BD (Vi
Authority: C
Ward: Reger
Cluster team
address
Lives with o

Basic details

Context Child
Date of birth Born 1 Jun 2
Gender Female
First language English
Nationality British
Ethnicity Mixed / Whit
Religion 7th Day Adv

Create group
View history

Click **'View history'** to see details of all groups that client has been or is a current member of.

Group history - James Grouppy (2192436)

Show 15 entries Search:

Group name	Group description	Group type	Start date	End date
Grouppy	James and John	Family	31/07/2022	

Showing 1 to 1 of 1 entries First Previous 1 Next Last

Group history - James Grouppy (2192436)

Show 15 entries Search:

Group name	Group description	Group type	Start date	End date
Grouppy	James and John	Family	31/07/2022	

Subjects

- James Grouppy
- John Grouppy
- Zebedee Grouppy

Showing 1 to 1 of 1 entries First Previous 1 Next Last

Using the Group Summary Record

Once a group has been created, a group summary record is available within Mosaic. Each group is given a **unique identifier ID** when it is created. In the example below the ID is **'145018'**

Family Details - Groupy (145018)
James and John

Summary | Personal relationships | Professional relationships | Case notes | Documents

Family

ID	Name	Date of birth	Gender	Start date	Actions
2192436	James Grouppy	04/07/2010 (12 years old)	Male	31/07/2022	
2192437	John Grouppy	04/07/2010 (12 years old)	Male	28/07/2022	
2192438	Zebedee Grouppy	10/09/1991 (30 years old)	Male	28/07/2022	

Showing 1 to 3 of 3 entries

Address(es)

Zebedee Grouppy

10 The Parade High Street
Watford
WD17 1AA ([View map](#))

James & John Grouppy

The Parade
10 Watford High Street
WD17 1AA ([View map](#))

Current work

No current work

The Group Summary Record as displayed above consists of five tabs namely:

- Summary
- Personal relationship
- Professional relationship
- Case notes
- Documents

Some information is automatically added to the group summary record and viewed on the different tabs while some are not, based on whether the information is recorded in the individual record of group members.

Additional information can then be recorded, or existing information edited via the relevant tab.

Information prepopulated into Group Summary Record

Some information pre populate from individual records of group members

Summary tab

Demographic information (Individual ID, name, date of birth and address)

Display addresses on members records

Professional Relationships tab

Individual professional relationships

(Allocated SW, School, GP, Teacher, Health Visitor etc)

Information NOT automatically populated from individual records of group members

- Workflow
- Case history
- Case notes
- Documents

Summary Tab

Group Membership

Members of a group are displayed on the Summary tab of the group summary record.

Family Details - Groupy (145018)

James and John

Summary | Personal relationships | Professional relationships | Case notes | Documents

Family Search:

ID	Name	Date of birth	Gender	Start date	Actions
2192436	James Grouppy	04/07/2010 (12 years old)	Male	31/07/2022	
2192437	John Grouppy	04/07/2010 (12 years old)	Male	28/07/2022	
2192451	Loveline Grouppy	20/07/2019 (3 years old)	Female	31/07/2022	
2192450	Madelene Grouppy	01/01/2015 (7 years old)	Female	31/07/2022	
2192438	Zebedee Grouppy	10/09/1991 (30 years old)	Male	28/07/2022	

Showing 1 to 5 of 5 entries First Previous 1 Next Last

Individuals in more than one group

It is possible for a person to be a member of multiple groups of different type simultaneously.

The person's summary will display a list of the groups of which they are a member.

DO NOT add children/young people to more than one group of same type. For example, do not add them to more than one Family group.

The workflow undertaken as part of the groups is indicated against all relevant work items by the group icon


Current work Workflow map History


Individual Case/Reflective Group Supervision (GROUP)
Assigned to: Yetunde Bright


The person's summary screen provides a full summary of **all** work both historic and current for the person. **This will include any group work items.**


Removing members of a group

There are two ways of removing group members from the group, based upon a worker's role.


Click  to delete a person from the group









Click  to end a person's membership

Family Details - Grouppy (145018) 


James and John 

Summary Personal relationships Professional relationships Case notes Documents

Family Search: 

ID	Name	Date of birth	Gender	Start date	Actions
2192436	James Grouppy	04/07/2010 (12 years old)	Male	31/07/2022	 
2192437	John Grouppy	04/07/2010 (12 years old)	Male	28/07/2022	 
2192451	Loveline Grouppy	20/07/2019 (3 years old)	Female	31/07/2022	 
2192450	Madelene Grouppy	01/01/2015 (7 years old)	Female	31/07/2022	
2192438	Zebedee Grouppy	10/09/1991 (30 years old)	Male	28/07/2022	

Showing 1 to 5 of 5 entries First Previous 1 Next Last

Clicking  **deletes** the group member, the following confirmation message is displayed for worker's confirmation before deletion.


Confirm


Deleting this person from this group will not retain a record in the group membership history. If you wish to retain a record of the group membership, please cancel this action and use end instead.


A member of a group should only be deleted where the person has been added incorrectly to the group, as there will be no record of their group membership once deleted.


NOTE:

It is only possible to delete a person where they have no workflow, standalone forms or case notes recorded at group level.

Otherwise, **X** is not shown (see screenshot above) and worker must then *end the workflow through appropriate routes* and afterward end the group membership using the  icon.

The  icon allows a worker to **end** a person's group membership. When a worker chooses this option, today's date is automatically entered as the end date. This date cannot be amended.

Family Details - Grouppy (145018) 


James and John 


Summary | Personal relationships | Professional relationships | Case notes | Documents

ID	Name	Date of birth	Gender	Start date	End date
2192436	James Grouppy	04/07/2010 (12 years old)	Male	31/07/2022	
2192437	John Grouppy	04/07/2010 (12 years old)	Male	28/07/2022	31/07/2022
2192451	Loveline Grouppy	20/07/2019 (3 years old)	Female	31/07/2022	
2192450	Madelene Grouppy	01/01/2015 (7 years old)	Female	31/07/2022	
2192438	Zebedee Grouppy	10/09/1991 (30 years old)	Male	28/07/2022	

Showing 1 to 5 of 5 entries

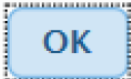
First Previous 1 Next Last

Note: When you click  the icon to *end a person's membership*, the system does not show you any confirmation message as it does when you click the **X** button to *delete membership*. It automatically ends the membership. If you have ended a person's membership in error, you can add the person to the group again.

If a worker  clicks to end a person's group membership where there is group workflow ongoing for the person, an error message is shown:

Error

Ending group membership has been prevented because:-
This person is a subject of one or more active group steps.
You must finish all active group work for the subject before ending group membership.



Once all workflow and case notes have been finished, the User will be able to end the person's group membership in this way.

Group Membership History

A full history of group membership is maintained at group level. To view, click the 'View group membership history' icon



Family Details - Grouppy (145018)

James and John

Summary | **Personal relationships** | **Professional relationships** | **Case notes** | **Documents**

Family Search:

ID	Name	Date of birth	Gender	Start date	End date
2192436	James Grouppy	04/07/2010 (12 years old)	Male	31/07/2022	
2192437	John Grouppy	04/07/2010 (12 years old)	Male	28/07/2022	31/07/2022
2192451	Loveline Grouppy	20/07/2019 (3 years old)	Female	31/07/2022	
2192450	Madelene Grouppy	01/01/2015 (7 years old)	Female	31/07/2022	
2192438	Zebedee Grouppy	10/09/1991 (30 years old)	Male	28/07/2022	

Showing 1 to 5 of 5 entries First Previous 1 Next Last

Clicking the button again returns to the current group membership.

Family Details - Grouppy (145018)

James and John

Summary | **Personal relationships** | **Professional relationships** | **Case notes** | **Documents**

Family Search:

ID	Name	Date of birth	Gender	Start date	Actions
2192436	James Grouppy	04/07/2010 (12 years old)	Male	31/07/2022	
2192437	John Grouppy	04/07/2010 (12 years old)	Male	28/07/2022	
2192451	Loveline Grouppy	20/07/2019 (3 years old)	Female	31/07/2022	
2192450	Madelene Grouppy	01/01/2015 (7 years old)	Female	31/07/2022	
2192438	Zebedee Grouppy	10/09/1991 (30 years old)	Male	28/07/2022	

Showing 1 to 5 of 5 entries First Previous 1 Next Last

A history can also be accessed from the person's individual record, through the **Group** → **View Group History** menu option:

English spoken English

File management

External system administration

Restrictions

Groups **Create group** **View history**

Nationality Canadian

Ethnicity Mixed / Any Other Mixed Background

7th Day Adventist (Ch) (Practising)

Display of Information on the Summary tab

Addresses:

Where there is no display address against the individual person record, no display address is shown on the group summary screen.

Address(es)

James, John, Zebedee & Madelene Grouppy

No display address

Loveline Grouppy

3 Glentworth Street
London
NW1 5PG ([View map](#))

Where there are display addresses recorded against the individual person record, they are displayed with subheadings indicating who shares specific addresses.

Address(es)

Zebedee Grouppy

10 The Parade High Street
Watford
WD17 1AA ([View map](#))

James & John Grouppy

The Parade
10 Watford High Street
WD17 1AA ([View map](#))

Where there are more than three different addresses for the group, they will appear 'collapsed', displaying only the names of the occupants. A worker can expand the list by clicking on the names.

Address(es)

Madelene Grouppy

Zebedee Grouppy

James & John Grouppy

Loveline Grouppy

Current Work:

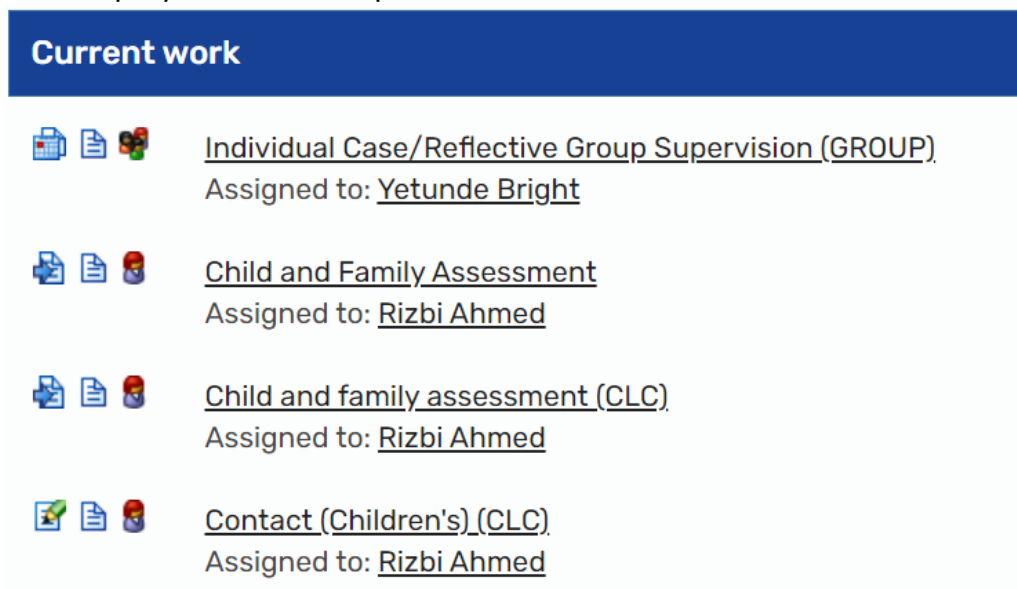
This displays only current *group pieces of work*.

In screenshot below, there is no current group item of work



They are displayed based on the model found on the person details screen of individual person record: *Incoming, Incomplete and Future*

See display model from person details screen below.



Tooltips and *screen information* indicates which pieces of work items belong to which subgroups or individuals

Navigating and Editing within the Group Summary Record

1. To display the content screen of each tab, click on the tab title.

The screenshot shows the 'Personal relationships' tab selected in the top navigation bar. Below the navigation bar is a 'Family' section with a search bar and a table of family members. The table has columns for ID, Name, Date of birth, Gender, Start date, and Actions. The first row is for James Grouppy (ID 2192436). Below the table are two sections: 'Address(es)' and 'Current work'. The 'Current work' section lists two items: 'Contact (Children's) (CLC)' for Zebedee Grouppy and 'Child in need visit (CLC)' for Madelene Grouppy.

ID	Name	Date of birth	Gender	Start date	Actions
2192436	James Grouppy	04/07/2010 (12 years old)	Male	31/07/2022	
2192451	Loveline Grouppy	20/07/2019 (3 years old)	Female	31/07/2022	
2192450	Madelene Grouppy	01/01/2015 (7 years old)	Female	31/07/2022	
2192438	Zebedee Grouppy	10/09/1991 (30 years old)	Male	28/07/2022	

2. To access the individual person record, click on the person's name or ID link

This screenshot is similar to the first one, but the 'Personal relationships' tab is selected. In the 'Family' table, the ID '2192436' and the name 'James Grouppy' are circled in red. The rest of the interface, including the 'Current work' section, is identical to the first screenshot.

ID	Name	Date of birth	Gender	Start date	Actions
2192436	James Grouppy	04/07/2010 (12 years old)	Male	31/07/2022	
2192451	Loveline Grouppy	20/07/2019 (3 years old)	Female	31/07/2022	
2192450	Madelene Grouppy	01/01/2015 (7 years old)	Female	31/07/2022	
2192438	Zebedee Grouppy	10/09/1991 (30 years old)	Male	28/07/2022	

3. Access Group summary record from individual person's record. There are two links available for the purpose on the personal record

a. Recently viewed

Type ↑	Subject	Title
Folder icon	<u>Grouppy (145018)</u> (2)	
Folder icon	<u>John Grouppy (2192437)</u> (0)	
Folder icon	<u>Zebedee Grouppy (2192438)</u> (1)	
Folder icon	<u>James Grouppy (2192436)</u> (0)	
Folder icon	<u>Test Test (2075012)</u> (74)	
Folder icon	<u>Madelene Grouppy (2192450)</u> (1)	
Folder icon	<u>Loveline Grouppy (2192451)</u> (0)	

b. The Groups section of person's details.


Regardless of the method of group creation, once completed the group (or groups) a person is a member of displays on the person summary record and provides a **hyperlink** to the group summary record.

This link shows the type of group, the group name, and the group description:


Personal relationships		Genogram	Change
Brothers	<u>John Grouppy</u>		
	<u>Zebedee Grouppy</u>		
Father	<u>Paul Test</u> Parental responsibility		
Sisters	<u>Loveline Grouppy</u>		
	<u>Madelene Grouppy</u>		
Groups			
Family			
<u>Grouppy</u>	James and John	James Grouppy, John Grouppy, Zebedee Grouppy, Madelene Grouppy, Loveline Grouppy	



4. To add existing or new family member to the group, click the 'Add to family' icon

Family Details - Grouppy (145018) 


James and John 


Summary | Personal relationships | Professional relationships | Case notes | Documents

Family Search:    -




ID	Name	Date of birth	Gender	Start date	Actions
2192436	James Grouppy	04/07/2010 (12 years old)	Male	31/07/2022	 



5. To view group membership history, click the 'View group membership history' icon

Family Details - Grouppy (145018) 


James and John 


Summary | Personal relationships | Professional relationships | Case notes | Documents

Family Search:    -




ID	Name	Date of birth	Gender	Start date	Actions
2192436	James Grouppy	04/07/2010 (12 years old)	Male	31/07/2022	 



6. To view family group's genogram, click 'View the genogram' icon

Family Details - Grouppy (145018) 


James and John 


Summary | Personal relationships | Professional relationships | Case notes | Documents

Family Search:    -




ID	Name	Date of birth	Gender	Start date	Actions
2192436	James Grouppy	04/07/2010 (12 years old)	Male	31/07/2022	 



7. Enter search criteria into the **Search box** to find an item in a long list of group members etc

Family Details - Grouppy (145018) 

James and John 

Summary | Personal relationships | Professional relationships | Case notes | Documents

Family Search:    -

ID	Name	Date of birth	Gender	Start date	Actions
2192436	James Grouppy	04/07/2010 (12 years old)	Male	31/07/2022	 

8. To view details of any 'collapsed' information, **click** on the displayed title link to **expand** item and click again to **collapse** item. Example: *Addresses on the Summary Screen*

Address(es)

Madelene Grouppy

Zebedee Grouppy


James Grouppy

Address(es)

Madelene Grouppy

218A Eversholt Street
London
NW1 1BD ([View map](#))

Zebedee Grouppy



9. To start an adhoc group workflow step (outside of workflow). Click 'Start new work'  icon




Address(es)




Madelene Grouppy

218A Eversholt Street
London
NW1 1BD ([View map](#))

Current work

   **Contact (Children's) (CLC)** for: Zebedee Grouppy ([Yetunde Bright](#))

   **Child in need visit (CLC)** for: Madelene Grouppy ([Yetunde Bright](#))



10. To view group workflow map, click the 'View workflow map'  icon




Address(es)




Madelene Grouppy

218A Eversholt Street
London
NW1 1BD ([View map](#))

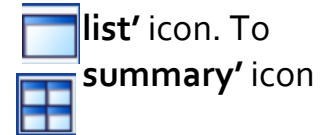
Current work









 

   **Contact (Children's) (CLC)** for: Zebedee Grouppy ([Yetunde Bright](#))

   **Child in need visit (CLC)** for: Madelene Grouppy ([Yetunde Bright](#))










11. To view group work history, click 'View work history' close the work history list view, click 'Return to group



Address(es)	Current work   
<p>Madelene Grouppy.</p> <p>218A Eversholt Street London NW1 1BD (View map)</p>	<p>   Contact (Children's) (CLC) for: Zebedee Grouppy (Yetunde Bright)</p> <p>   Child in need visit (CLC) for: Madelene Grouppy (Yetunde Bright)</p>

12. To resume work on an incomplete work item, click its cog icon to display list of options



Address(es)	Current work   
<p>Madelene Grouppy.</p> <p>218A Eversholt Street London NW1 1BD (View map)</p>	<p>   Contact (Children's) (CLC) for: Zebedee Grouppy (Yetunde Bright)</p> <p>   Child in need visit (CLC) for: Madelene Grouppy</p> <ul style="list-style-type: none">Resume ←Summary ←

Professional Relationships

The **Professional Relationship** tab is accessible from the group summary screen. It shows a concatenated view of all professional and organisational relationship for all current members of the group. Relationships recorded at the individual level in personal records is also included in this view.

Family Details - Groupy (145018)

James and John

Summary Personal relationships Professional relationships Case notes Documents

Show 15 entries Search:

Worker/Organisation	Relationship	Telephone number	Action
Beverley Brown	Allocated Worker		
Michael Hillier	Teacher	020 7974 2882	

Showing 1 to 2 of 2 entries First Previous 1 Next Last Add

In cases where children within the family have different allocated workers, different teachers, attend different schools, receive support from different professionals, it is especially useful to see all the information in one place.

A worker can see who the relationship is recorded against by clicking on the blue arrows.

Family Details - Groupy (145018)

James and John

Summary Personal relationships Professional relationships Case notes Documents

Show 15 entries Search:

Worker/Organisation	Relationship	Telephone number	Action
Beverley Brown	Adoption Support		
Beverley Brown	Allocated Worker		
James Groupy (31/07/2022 -)			
Michael Hillier	Teacher	020 7974 2882	

Showing 1 to 3 of 3 entries First Previous 1 Next Last Add

A new professional relationship can be added in bulk by choosing the **Add** button. This prompts the worker, first to *find* and *choose the professional or the organisation*.

Find party

Find worker | **Find organisation**

At least one field marked with a # is required

Last name #

First name #

Include only workers with a current role

Find **Cancel**

Find party

Find worker results

Searched for: First name: **Bev**, Last name: **Brown**, Include only workers with a current role: **Checked**

Show entries Search:

ID	Other workers	Job title	Role	Organisation
7010209	Beverley Brown		Corelogic Worker	CSSW Children and Families Division

Showing 1 to 1 of 1 entries **First** **Previous** **1** **Next** **Last**

Find again **Cancel**

Worker is then prompted to choose which group members the relationship is relevant to and confirm it by click 'OK'.

Worker is then prompted to choose which group members the relationship is relevant to. Once confirmed the relationship information shows at the group and individual record automatically.

Add

Worker/Org name* **Find again**

Relationship type*

Start date*

End date

Show **15** entries Search:

Name	Date of birth	<input type="checkbox"/>
James Grouppy	04/07/2010	<input type="checkbox"/>
Loveline Grouppy	20/07/2019	<input type="checkbox"/>
Madelene Grouppy	01/01/2015	<input checked="" type="checkbox"/>
Zebedee Grouppy	10/09/1991	<input checked="" type="checkbox"/>

Showing 1 to 4 of 4 entries **First** **Previous** **1** **Next** **Last**

OK **Cancel**

A worker can then end common relationships for several individuals by choosing the icon next to the required professional relationship. This automatically populates the same **end date** and **end reason** on each person's summary.

Family Details - Grouppy (145018)

James and John

Summary **Personal relationship**

Show **15** entries

Worker/Organisation

- [Beverley Brown](#)
- [Beverley Brown](#)
- [Michael Hillier](#)

Showing 1 to 3 of 3 entries

End relationship - all subjects

Ending relationship with Beverley Brown(Adoption Support) for all current subjects of the relationship.

End date*


End reason*

OK **Cancel**


The end date can not be earlier than the current day's date:


End relationship - all subjects


Ending relationship with Beverley Brown(Allocated Worker) for all current subjects of the relationship.

End date * 






⚠ The end date cannot be earlier than [31/07/2022], the latest start date for the relationships

End reason * 

Family Details - Grouppy (145018) 

James and John 

- Summary
- Personal relationships
- Professional relationships
- Case notes
- Documents

Family						Search:					
ID	Name	Date of birth	Gender	Start date	End date						
2192436	James Grouppy	04/07/2010 (12 years old)	Male	31/07/2022							
2192437	John Grouppy	04/07/2010 (12 years old)	Male	28/07/2022	31/07/2022						
2192451	Loveline Grouppy	20/07/2019 (3 years old)	Female	31/07/2022							
2192450	Madelene Grouppy	01/01/2015 (7 years old)	Female	31/07/2022							
2192438	Zebedee Grouppy	10/09/1991 (30 years old)	Male	28/07/2022							

Showing 1 to 5 of 5 entries

Case Notes

Case note tab is accessible from the group summary screen. The Case note screen provides a list of all case notes recorded at the group level.

Family Details - Groupy (145018)

James and John

Summary Personal relationships Professional relationships **Case notes** Documents

Show 15 entries Search:

Status Title Type Contact date Completed By worker With team Appendices

No records to display

Showing 0 to 0 of 0 entries First Previous Next Last

View Add

Just as in adding bulk professional relationships, a worker can also record case notes simultaneously for all or a subgroup of group members. Worker is given the opportunity to choose which members of the group to record the case note against.

To record a group case note, click **Add** button

Family Details - Groupy (145018)

James and John

Summary Personal relationships Professional relationships **Case notes** Documents

Show 15 entries Search:

Status Title Type Contact date Completed By worker With team Appendices

No records to display

Showing 0 to 0 of 0 entries First Previous Next Last

View **Add**

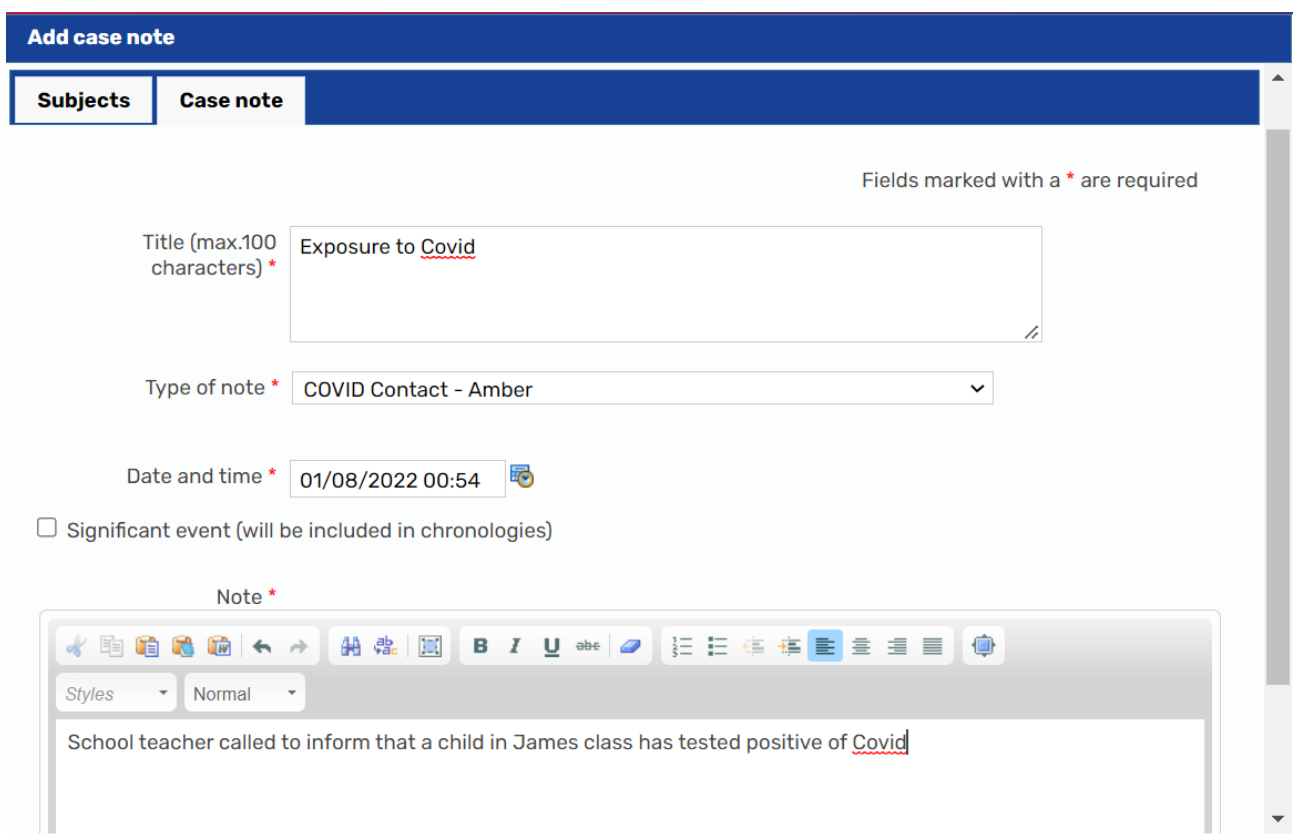
There are two tabs in the 'Add case note' screen.

On the **Subjects** tab, the worker is prompted to choose which members of the group the case note is recorded against using the check boxes next to their names.



On the **Case note** tab, worker can record a group case note with same functions as for individual case note.



Complete the various fields of the case note screen as usual.



Worker can **finish** case note by clicking the green with white tick  icon.

Worker can **intermittently save** case note by click the save  icon.

Add case note

Subjects **Case note**



Fields marked with a * are required

Title (max.100 characters) *

Type of note *

If worker click the green icon to **finish the case note**, a confirmation is requested. And a warning given that once finished the worker will not be able to edit the case note except they have sufficient privileges to do so.

Add case note

Subjects **Case note**


Fields marked with a * are required

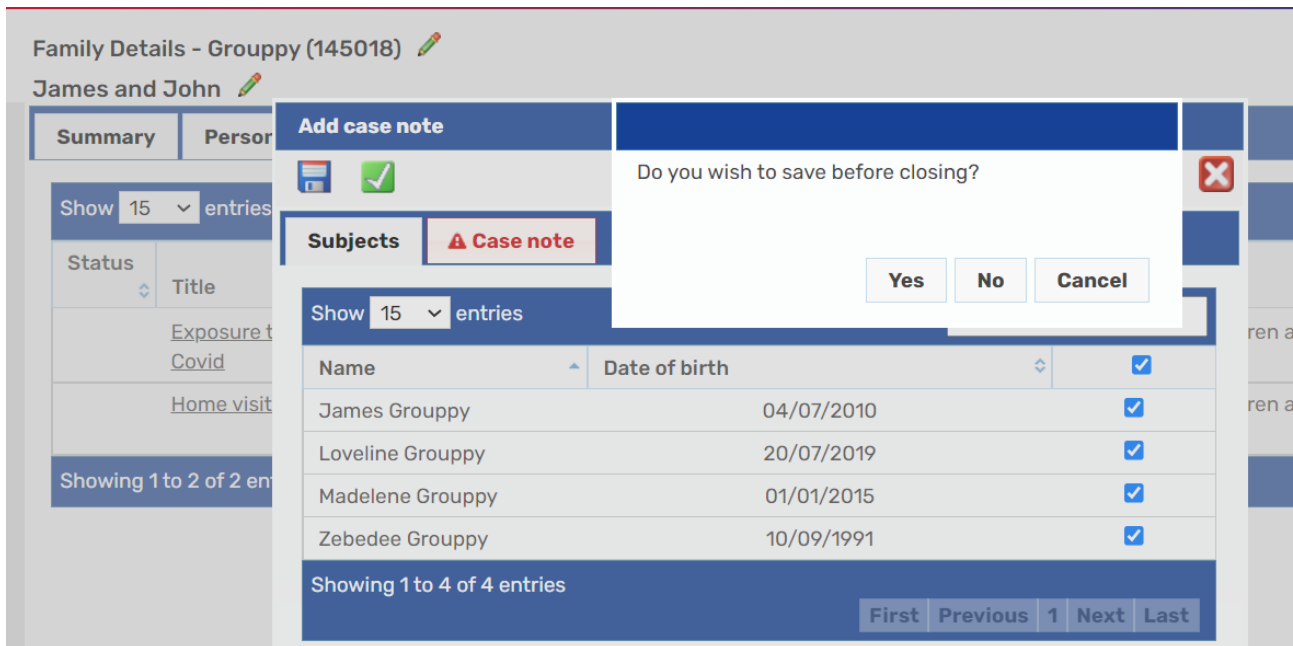
Title (max.100 characters) *

Type of note *

Confirm finish case note

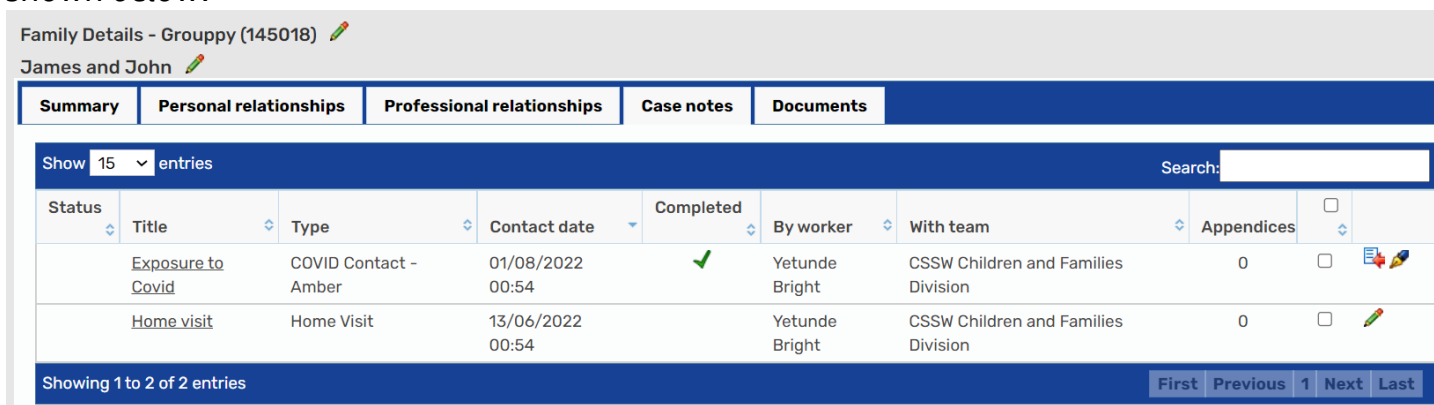
If you finish this case note you will not be able to edit (overwrite) it unless you have sufficient privileges, do you wish to continue?


Worker can **save and close case note** by clicking the red with white X  icon, in which case worker will be prompted for confirmation of saving the case note before closing.



Worker should note that there is a **difference** between **finishing** and **closing** a case note. A *finished* case note **can not be edited** but it can be **appended to**. While a *saved* case note is an **incomplete case note** that worker with sufficient permissions has a **24-hour window** before it times out. After which worker is only able to append to it with appropriate permissions as individual case notes.

As soon as the case note is **saved/finished** it is shows against **both the group and the individual record** of those the case note is about. *The group record view is as shown below.*




At the individual level, a group case note as every other group work items will have the  con next to it. See screen shot below of an individual person summary case notes screen showing both group and individual case notes.

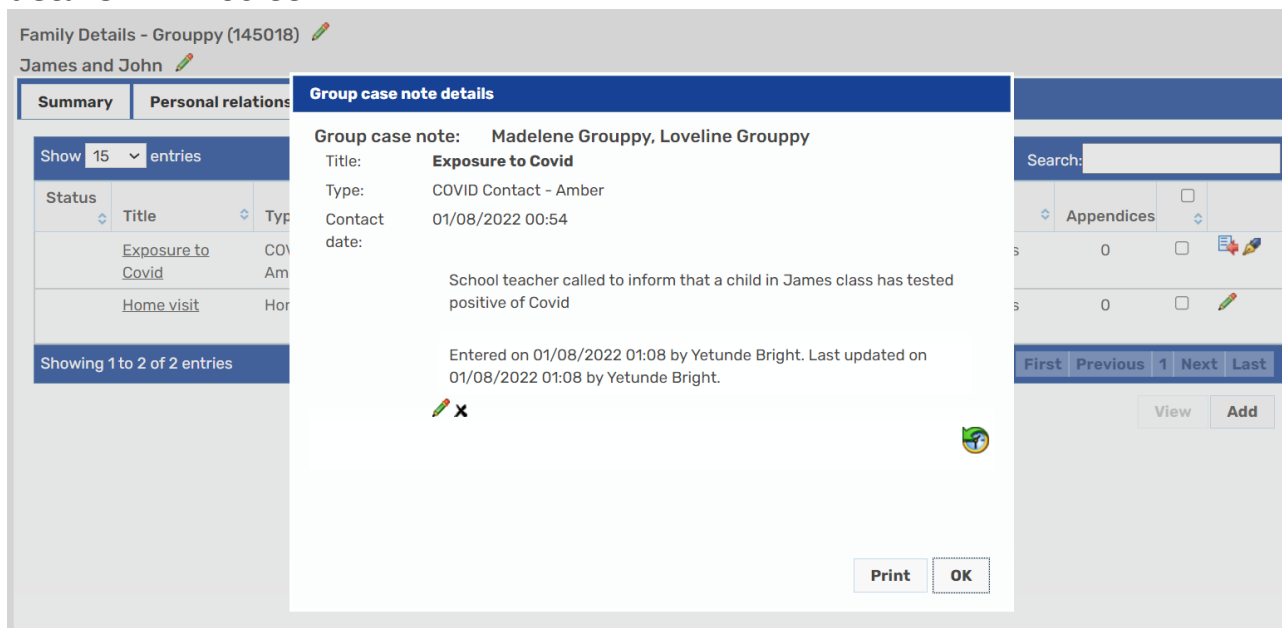
Home People Organisations Workers Contracts Finance Reports Tools Help Sign out						
Case notes - James Grouppy (2192436) born 04 Jul 2010 (12 years old)						
Title	Type	Contact date	Created by	Team	Appendices	
Home Visit	Discussion / Consultation	11/07/2022	Yetunde Bright	CSSW Children and Families Division	0	
Home visit	Home Visit	13/06/2022	Yetunde Bright	CSSW Children and Families Division	0	


Important things to note about group case notes


- * Group case notes shows at individual level, but can only be edited at group level
- * A group case note shows exactly same information on each person's individual but it can not be edited for each individual in the way that Users can with copied case notes.
- * Group case notes can be appended by users as in individual case notes if worker has appropriate permissions
- * Case notes can now be amended or deleted if user has the appropriate permissions
- * Finished case notes are amended via the icon
- * Incomplete case notes are amended by the pencil icon
- * Case notes are deleted by selecting the icon

Delete a Group case note

Click the  icon next to the case note to be deleted, to display **group case note details** screen



Family Details - Grouppy (145018) 

James and John 

Group case note details

Group case note: Madelene Grouppy, Loveline Grouppy



Title: **Exposure to Covid**


Type: COVID Contact - Amber

Contact date: 01/08/2022 00:54


School teacher called to inform that a child in James class has tested positive of Covid

Entered on 01/08/2022 01:08 by Yetunde Bright. Last updated on 01/08/2022 01:08 by Yetunde Bright.

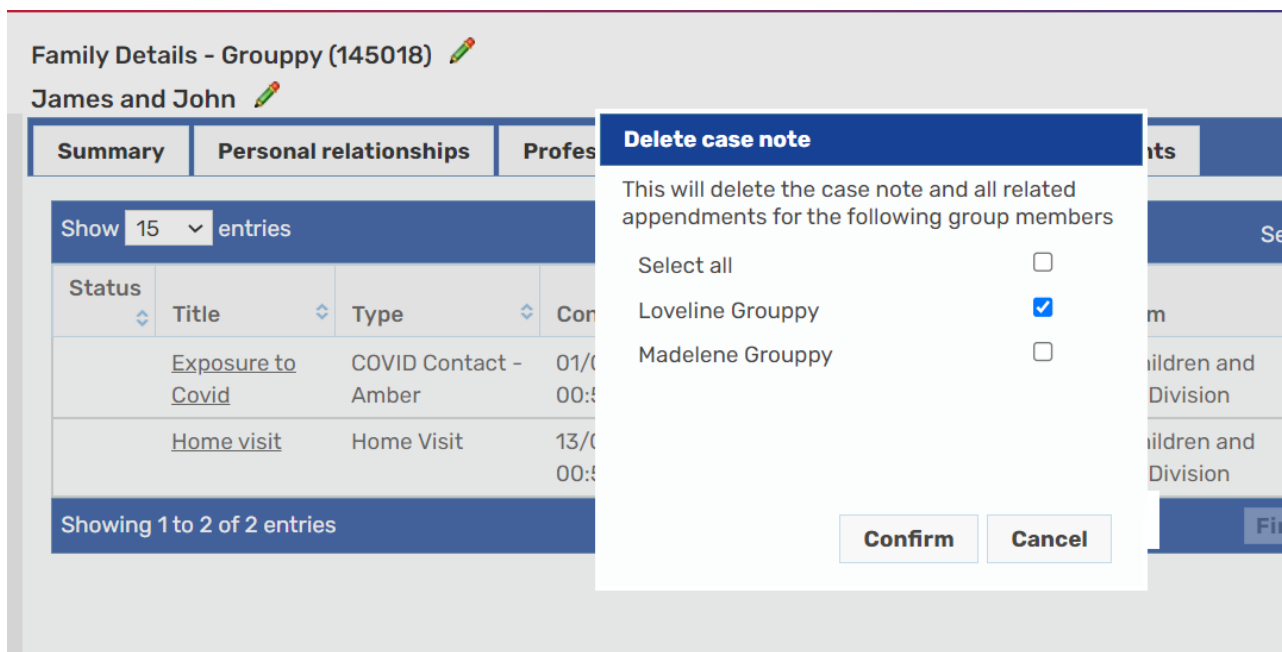
 





Print OK

Click the  icon to delete the case note

User is prompted in the **Delete case note screen** to select group member to delete the case note from.



Family Details - Grouppy (145018) 

James and John 

Delete case note

This will delete the case note and all related appendments for the following group members

Select all

Loveline Grouppy

Madelene Grouppy

Confirm Cancel

Once worker has selected appropriate members and clicked confirm, there will be a final message to confirm they are sure they want to delete the note.

Summary

Personal relationships

Confirm delete case note

Are you sure you want to delete this case note and all related appendments for: Loveline Groupy

OK

Cancel

Show 15  entries

Status 	Title 	Type
	Exposure to Covid	COVID Contact Amber
	Home visit	Home Visit

Search:

Appendices

Children and	0
Division	
Children and	0

Group documents

The **Documents** tab is accessible from the group summary screen.

The tab provides a list of all documents including **Mosaic forms and letters** completed in Mosaic steps or outside of workflow from the documents tab as well as **attachments** that have been **recorded/uploaded at group level**.

The Documents tab is split into two tabs namely '**Forms and letters**' and '**Attachments**'.

Family Details - Groupy (145018)

James and John

Summary Personal relationships Professional relationships Case notes Documents

Forms and letters Attachments

Documents shown for this group only

Show 15 entries Search:

Document	Category	Sub-category	Type	Subjects	Date	Step status	Actions
Fostering and Adoption - Finance Request	Confidential Info - Adoption & Fostering	Confidential Info - Adoption Support	FORM		01/08/2022 03:02:31		
Children's contact (CLC)	NONE		FORM		31/07/2022 19:40:10	Incomplete	
Record of child in need visit (CLC)	NONE		FORM		31/07/2022 19:36:49	Incomplete	

Showing 1 to 3 of 3 entries

First Previous 1 Next Last

Show more people Download all forms and letters Create

*Hover over the con to see which group members documents are recorded against.

*The **Actions** column provides a direct link to the step summary which the document is recorded within.

*Where the document is recorded outside of workflow using the 'Create' option on the Documents tab, the worker can edit the document (until it is finished) or delete the document (if they have sufficient permissions).

It is possible to have Mosaic group record set up to show a concatenated view of all individual and group documents for a family group as default or make it possible for the user to choose to add the documents for an individual in by click **'Show More People'**.

Family Details - Groupy (145018)

James and John

Summary | Personal relationships | Professional relationships | Case notes | Documents

Forms and letters | Attachments

Documents shown for this group only

Show 15 entries Search:

Document	Category	Sub-category	Type	Subjects	Date	Step status	Actions
Fostering and Adoption - Finance Request	Confidential Info - Adoption & Fostering	Confidential Info - Adoption Support	FORM		01/08/2022 03:02:31		
Children's contact (CLC)	NONE		FORM		31/07/2022 19:40:10	Incomplete	
Record of child in need visit (CLC)	NONE		FORM		31/07/2022 19:36:49	Incomplete	

Showing 1 to 3 of 3 entries First Previous 1 Next Last

Show more people | Download all forms and letters | Create

The **'Show more people'** screen allows you to add the individual documents for the members chosen to the Group Summary screen.

Show more people

Also include documents for

- Select All
- Gabby Connor (Family)
- Sarah Connor (Family)

Show Cancel

Notice the concatenated view of documents in screenshot below showing both individual documents and group documents.

The screenshot shows a web interface with a top navigation bar containing 'Summary', 'Professional Relationships', 'Case Notes', and 'Documents'. Below this is a sub-navigation bar with 'Forms and Letters' and 'Attachments'. A blue banner at the top of the table area reads 'Documents shown for this group and related people and groups' with a 'Reset' button to its right. The table below has a 'Show 15 entries' dropdown and a search box. The table columns are Document, Category, Sub-category, Type, Subjects, Date, and Actions. The 'Subjects' column contains names like 'Gabby Connor' and 'Sarah Connor'. At the bottom, there are navigation buttons: 'Showing 1 to 12 of 12 entries', 'First', 'Previous', 'Next', 'Last', 'Show More People', 'Download All', and 'Create'.

Document	Category	Sub-category	Type	Subjects	Date	Actions
Multi-agency SEND Referral and Decision Record	Referral	SEND	FORM	Gabby Connor	18/03/2016	
Co-ordinated SEND Assessment	Assessment	SEND	FORM	Gabby Connor	18/03/2016	
Contact (Adults)	Contact / Enquiry	Contact	FORM	Sarah Connor	18/03/2016	
Adult Referral	Referral	Contact Assessment	FORM	Sarah Connor	18/03/2016	
Drug Use Screening Tool (DUST)	Assessment	Specialist Assessment	FORM		18/03/2016	
Review of Child's Plan	Review	Review of Child's Plan	FORM		17/03/2016	
MASH Screening Form	Contact / Enquiry	MASH Screening	FORM		07/03/2016	
MASH response for Police	Contact / Enquiry	MASH Information Gathering	FORM		07/03/2016	
MASH response for Education	Contact / Enquiry	MASH Information Gathering	FORM		07/03/2016	
Contact and Referral Record	Contact / Enquiry	Contact and Referral	FORM		07/03/2016	
Child and Family Assessment	NONE		FORM		07/03/2016	
Child's Plan	Planning	Child's Plan	FORM		07/03/2016	

Note


The message at the top of the document table changes from Documents shown for the group only to Documents shown for this group and related people and groups. A user can choose to **Reset** the results, returning to only group documents.

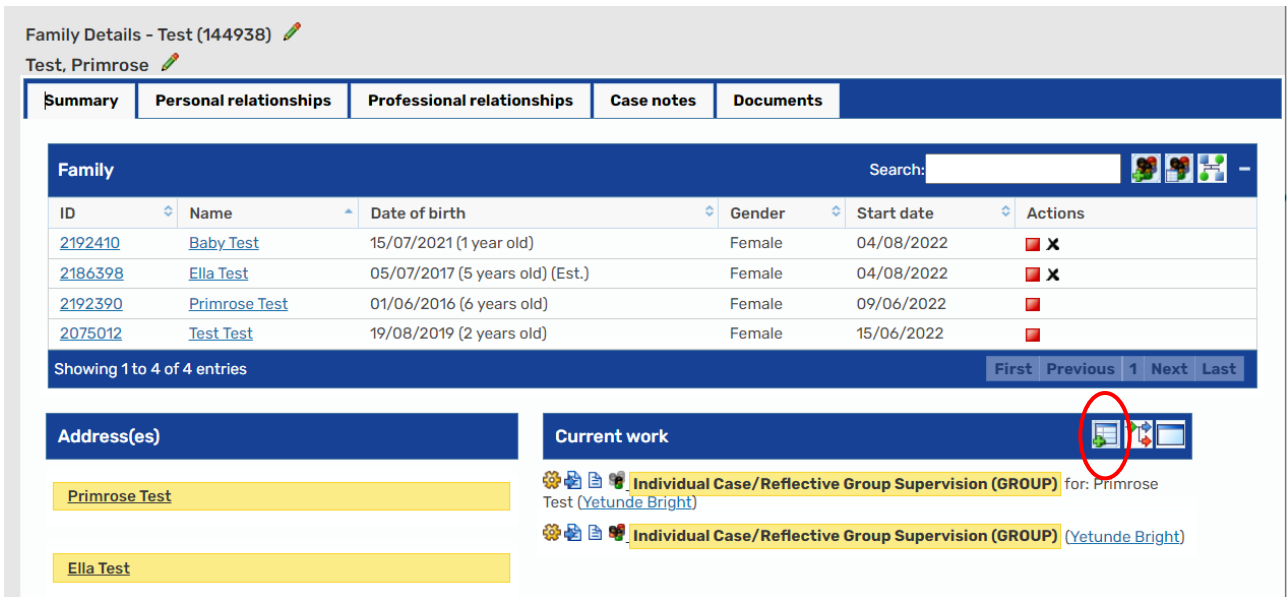
Appendix: Completing Group Workflow Items


Individual Case/Reflective Group Supervision


(Note: Supervision record can still be started as previously on **individual client record** using **Start/New...** menu option)

1) Start a New work item from the *Group Summary Record*

In **Current work** section of the group summary record, click on the **Start New work icon** 









Family Details - Test (144938) 

Test, Primrose 

Summary Personal relationships Professional relationships Case notes Documents

Family Search:


ID	Name	Date of birth	Gender	Start date	Actions
2192410	Baby Test	15/07/2021 (1 year old)	Female	04/08/2022	 
2186398	Ella Test	05/07/2017 (5 years old) (Est.)	Female	04/08/2022	 
2192390	Primrose Test	01/06/2016 (6 years old)	Female	09/06/2022	
2075012	Test Test	19/08/2019 (2 years old)	Female	15/06/2022	




Showing 1 to 4 of 4 entries First Previous 1 Next Last




Address(es)

Primrose Test

Ella Test

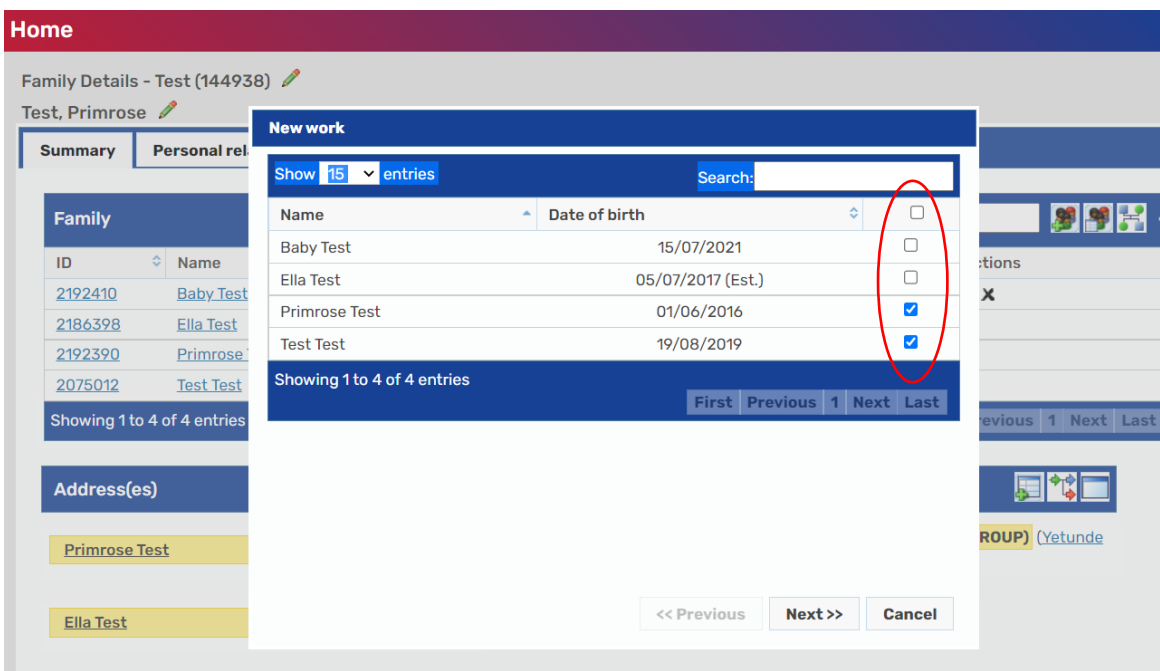
Current work 

   Individual Case/Reflective Group Supervision (GROUP) for: Primrose Test (Yetunde Bright)


   Individual Case/Reflective Group Supervision (GROUP) (Yetunde Bright)


Mosaic prompts the worker to choose which members of the group will be the subjects of the work item and click **Next...**

Note: It could be for all the members of the group or for a subset. Below Just two (*Test and Primrose*) are selected as subjects *and not Ella or Baby*.



Home

Family Details - Test (144938) 

Test, Primrose 

Summary Personal relationships Professional relationships Case notes Documents

Family Search:

ID	Name	Date of birth	Actions
2192410	Baby Test	15/07/2021	<input type="checkbox"/>
2186398	Ella Test	05/07/2017 (Est.)	<input type="checkbox"/>
2192390	Primrose Test	01/06/2016	<input checked="" type="checkbox"/>
2075012	Test Test	19/08/2019	<input checked="" type="checkbox"/>

Showing 1 to 4 of 4 entries First Previous 1 Next Last

Address(es)

Primrose Test

Ella Test

New work

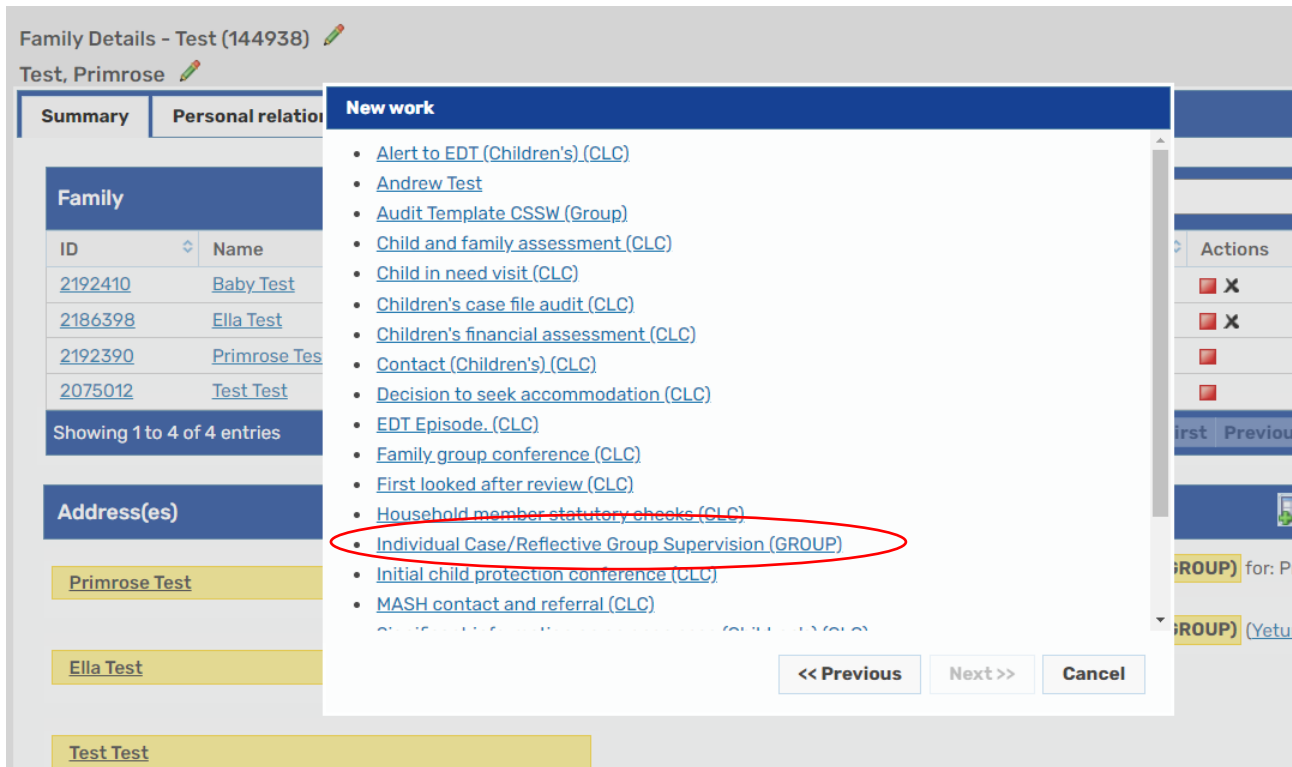
Show 15 entries Search:

Showing 1 to 4 of 4 entries First Previous 1 Next Last

<< Previous Next >> Cancel

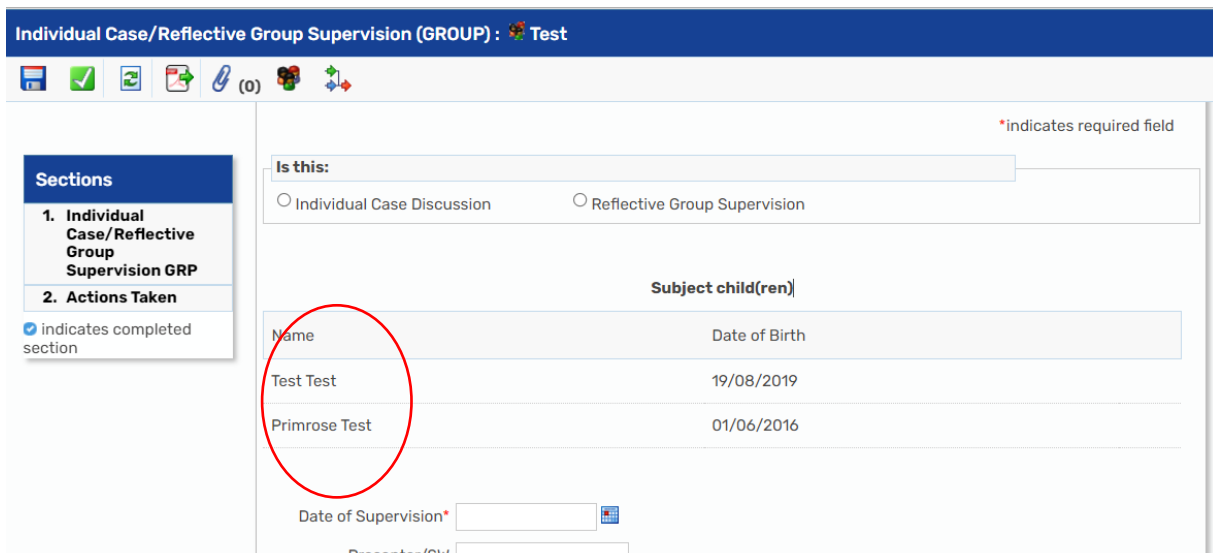
Mosaic prompts the worker to choose a piece of work to start for the *selected group members*.

If workers do not see the work they are expecting here, they should first check they have chosen the correct family members. If there is still a problem, contact the **Mosaic super user**.





In this case, double click **Individual Case/Reflective Group Supervision**. This **opens** the work step and **updates** the current work for the *group record* and the *individual records* for the group members chosen.

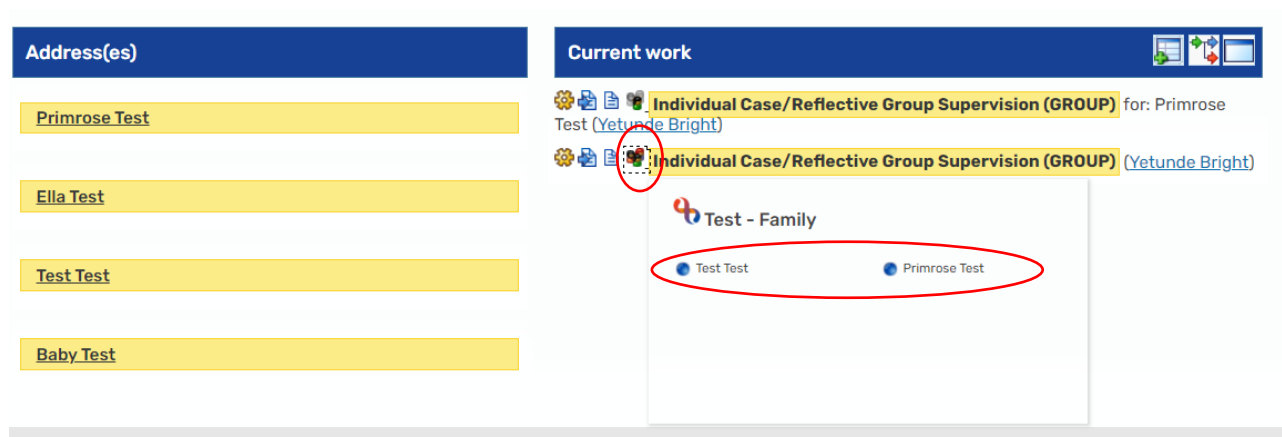
Note: Only the selected family group members (*Primrose and Test*) are in the **subject child(ren)** table. The table is not **editable** at this point. Worker can no longer add a subject to the workflow step or remove one from it.




2) Start a new Incoming work item

If the **Individual Case/Reflective Group Supervision** step is already in worker's **Current work** folder, it is started differently from when it is started as a new step that can initiate a workflow.

To know *the Subjects* of a work item before starting it, **click**  on the group icon to display a screen tip with that information as shown  below.



To start an incoming workflow item of work, Click on its yellow cog  icon and choose the option to '**Start work**'.



This **opens** the work step and **updates** the current work for the *group record* and the *individual records* for the group members chosen.

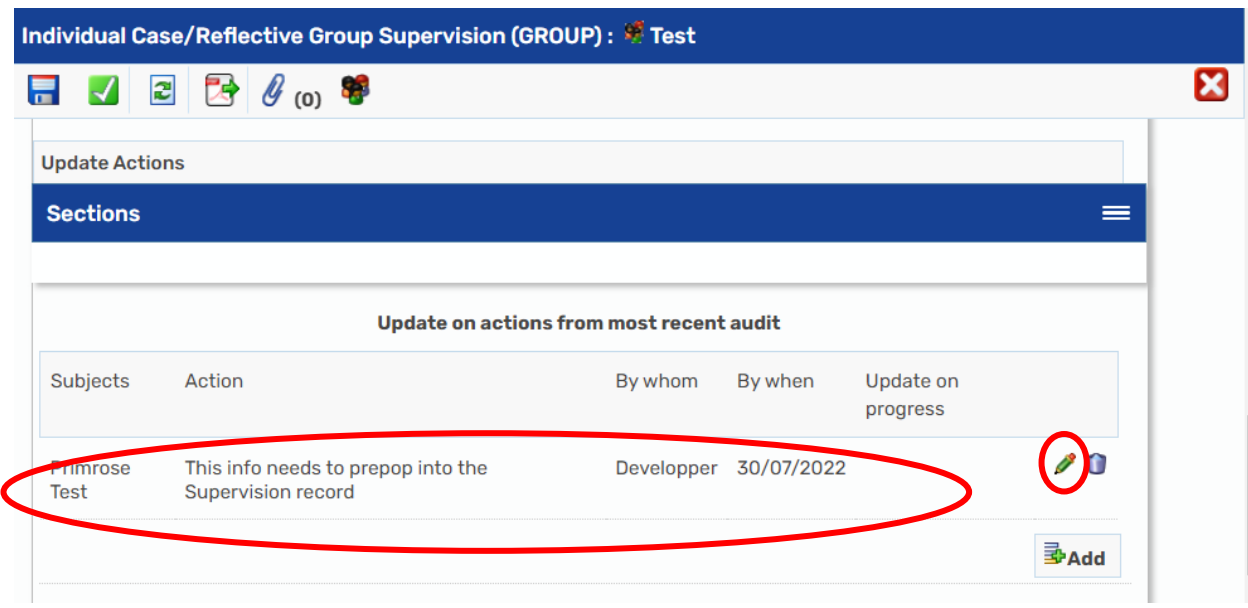
The workflow step is recorded in the same way as other workflow steps in Mosaic, with the completion of the mandatory and any optional forms, and completion of requests as part of the step. However, this must be done with special attention to **the following sections of the form** and workflow step that has been group enabled.


Following are sections of the form that have been group enabled and how to complete them.

1) **Update on actions from most recent audit.**

Information populates from the most recent audit (Audit Template) into the Supervision record to enable worker's manager (SP) to keep an eye on the progress of the worker's implementation of the required actions from the most recent Audit.

Note that the subject(s) of each action listed can vary depending on the relevant members of the group for whom the Audit Template was completed.



The manager (SP) clicks the edit  icon of **each action** to provide an update on its status in the 'Update on progress' text box and then 'save changes'.

Update on actions from most recent audit

Select Subject:*

- Baby Test Primrose Test Select all

Action This info needs to prepop into the Supervision record

By whom Developer

By when 30/07/2022

Update on progress It did. Tested and approved.






Save changes


Cancel

2) Update on actions from the previous supervision.

Information populates from the most recent audit (Audit Template) into the Supervision record to enable worker's manager (SP) to keep an eye on the progress of the worker's implementation of the required actions from the previous supervision.

Note that the subject(s) of each action listed can vary depending on the relevant members of the group for whom the previous supervision was completed.

Update on actions from previous supervision				
Subjects	Previous action	By whom	By when	Update on progress
Test Test, Primrose Test	Background needs to prepop	developer	31/07/2022	 
Test Test	NHS number updated	Social worker	29/07/2022	  



The manager (SP) clicks the edit  icon of **each action** to provide an update on its status in the 'Update on progress' text box and then 'save changes'.

*Note that the action being update in screen shot below is for 2 members of the family group. An action can be applicable to either **all** or **any subset** of the family group.*

Update on actions from previous supervision

Select Subject:*

Test Test Primrose Test Select all

Previous action: Background needs to prepop

By whom: developer

By when: 31/07/2022

Update on progress: It did prepopulate.

3) Agreed actions

The manager (SP) will complete the 'Agreed actions' table with required actions from the current supervision by clicking the **Add button**

Agreed actions			
Subjects	Action	By whom	By when
 Add			

Mosaic will prompt the user to **select the subject(s)** to which the action is applicable, what the action is, who is responsible for carrying it out (*By whom*) and the time scale (*By when*).

Use 'Add' button to add more actions and 'Add and close' to add the last action.

Agreed actions


Select Subject:*

Baby Test Ella Test Primrose Test

Select all

Action: Home visit to discuss respite

By whom: Social worker

By when: 08/08/2022 

Add **Add and close** **Close**

The completed Agreed actions table will be as shown below.

Note that applicable actions has been recorded against different sub groups of the family group.

Sections

1. Individual Case/Reflective Group Supervision GRP

2. Actions Taken

indicates completed section

Next Steps (decisions and actions)

What needs to happen now for this child/ young person? Detail any direct work to be carried out; visits and meetings to be arranged and any joint work with other agencies.

Outline what action is needed, by whom and by when ensuring that actions have a timescale.

Agreed actions

Subjects	Action	By whom	By when
Baby Test, Ella Test	Secure school place by September	Parents	05/09/2022
Primrose Test	Home visit to discuss respite	Social worker	08/08/2022

Add

4) Details of next Supervision

Date of next supervision can be specified for individual members of the family group as necessary based on their respective plan/needs.

Sections

1. Individual Case/Reflective Group Supervision GRP

2. Actions Taken

indicates completed section

Details of next Supervision

Baby Test

Date of next supervision

Ella Test

Date of next supervision

Primrose Test

Date of next supervision

Case supervision is at a minimum of every 2 months for LAC and CIN and monthly for CP

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5) Next Action (next workflow step)

Worker selects the next step in the workflow in **section 2: Actions Taken**

Individual Case/Reflective Group Supervision (GROUP) : Test

Individual Case/Reflective Group Supervision GRP

Sections

- 1. Individual Case/Reflective Group Supervision GRP
- 2. Actions Taken**

Next Actions

Next actions						
Next action	Subjects	Assigned to	Reason	Note	Priority	Status
Add						

Example 1

A next action step can be specific to any one or more of the members of the family group.

In the screen shot below, the manager has decided that a Strategy Discussion needs to be completed for Baby & Primrose but not Ella.

Select action – Strategy Discussion
Applies to – Baby Test & Primrose Test
Pass to worker – Yetunde Bright

Click 'Add' to add another next action and 'Add and close' for the last next action to be added.

Next actions

Select action: Strategy discussion (CLC)

Applies to:

- Baby Test
- Ella Test
- Primrose Test
- Select all

Send Immediately?

Pass to worker: Yetunde Bright

[Find](#) [Clear](#) [Assign To Me](#)

Note: [Empty text area]

Priority

[Add](#) [Add and close](#) [Close](#)

Example 2

Select action – Next Individual Case/Reflective Group Supervision

Applies to – All (Baby, Ella & Primrose)

Pass to worker – Yetunde Bright

Click 'Add' to add another next action and 'Add and close' for the last next action to be added.

Next actions

Select action: Next Individual Case/Reflective Group Supervision

Applies to:

Baby Test Ella Test Primrose Test

Select all

Send Immediately?

Scheduled Date: 10/10/2022

Pass to worker: Andrew Cohen **Find** **Clear** **Assign To Me**

Note:

Add **Add and close** **Close**

Screen shot below is of multiple next actions for different subgroups of members in the family group assigned to different workers.

Individual Case/Reflective Group Supervision GRP

Sections

- 1. Individual Case/Reflective Group Supervision GRP
- 2. Actions Taken

indicates completed section

2. Actions Taken


Next Actions



Next actions							
Next action	Subjects	Assigned to	Reason	Note	Priority	Status	
Strategy discussion (CLC)	Primrose Test Baby Test	Yetunde Bright				Proposed	
Next Individual Case/Reflective Group Supervision	Ella Test Primrose Test Baby Test	Andrew Cohen				Proposed	

Add


Completing Group Workflow Items (Audit Template)

1) Start a New Audit Template

In **Current work** section of the group summary record, click on the **Start New work icon** 


Family Details - Groupy2 (145028) 
John, James, Zebedee, Loveline 

Summary | Personal relationships | Professional relationships | Case notes | Documents

Family Search: 

ID	Name	Date of birth	Gender	Start date	Actions
2192436	James Grouppy	04/07/2010 (12 years old)	Male	01/08/2022	
2192437	John Grouppy	04/07/2010 (12 years old)	Male	01/08/2022	
2192438	Zebedee Grouppy	10/09/1991 (30 years old)	Male	01/08/2022	

Showing 1 to 3 of 3 entries First Previous 1 Next Last

Address(es) **Current work** 

Zebedee Grouppy No current work

2) Select 'Subject(s) of work item from the family group

New work

Show 15 entries Search:

Name	Date of birth	<input type="checkbox"/>
Baby Test	15/07/2021	<input checked="" type="checkbox"/>
Ella Test	05/07/2017 (Est.)	<input type="checkbox"/>
Primrose Test	01/06/2016	<input checked="" type="checkbox"/>
Test Test	19/08/2019	<input type="checkbox"/>

Showing 1 to 4 of 4 entries First Previous 1 Next Last

Mosaic prompts the worker to choose a piece of work to start for the *selected group members*.

*If workers do not see the work they are expecting here, they should first check they have chosen the correct family members. If there is still a problem, contact the **Mosaic super user**.*

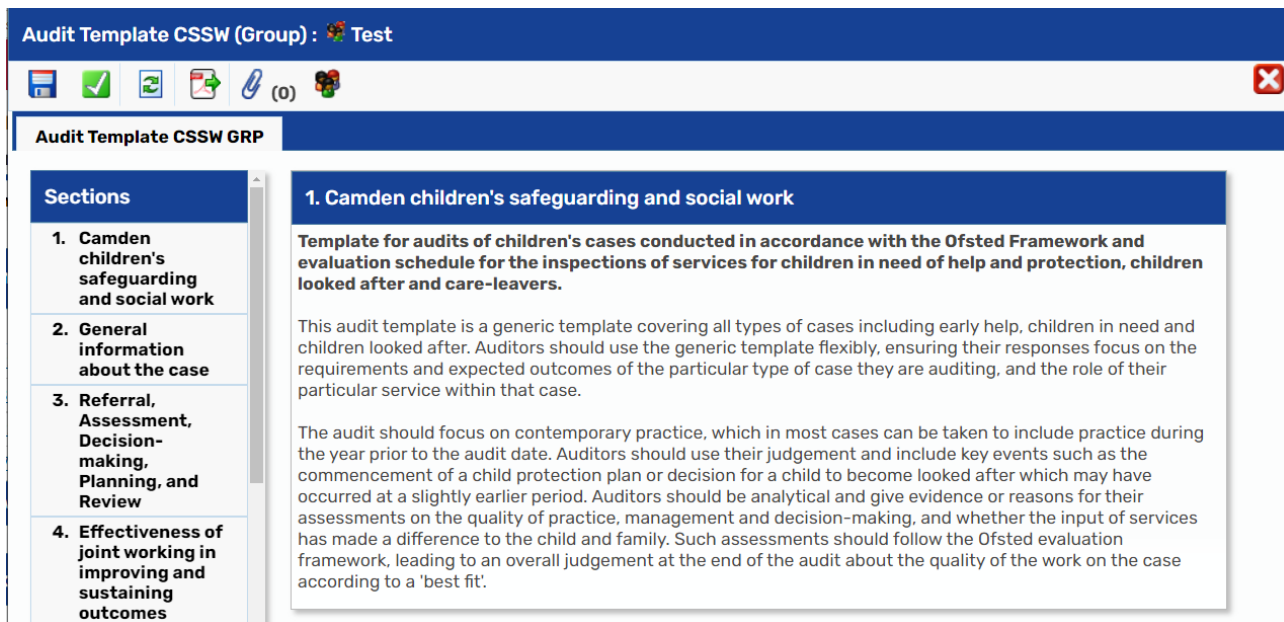
New work

- [Alert to EDT \(Children's\) \(CLC\)](#)
- [Andrew Test](#)
- [Audit Template CSSW \(Group\)](#)
- [Child and family assessment \(CLC\)](#)
- [Child in need visit \(CLC\)](#)
- [Children's case file audit \(CLC\)](#)
- [Children's financial assessment \(CLC\)](#)
- [Contact \(Children's\) \(CLC\)](#)
- [Decision to seek accommodation \(CLC\)](#)
- [EDT Episode. \(CLC\)](#)
- [Family group conference \(CLC\)](#)
- [First looked after review \(CLC\)](#)
- [Household member statutory checks \(CLC\)](#)
- [Individual Case/Reflective Group Supervision \(GROUP\)](#)
- [Initial child protection conference \(CLC\)](#)
- [MASH contact and referral \(CLC\)](#)

<< Previous Next >> **Cancel**

In this case, double click **Audit Template**.


This **opens** the work step and **updates** the current work for the *group record* and the *individual records* for the group members chosen.





The workflow step is recorded in the same way as other workflow steps in Mosaic, with the completion of the mandatory and any optional forms, and completion of requests as part of the step. However, this must be done with special attention to **the following sections of the form** and workflow step that has been group enabled.

Following are sections of the form that have been group enabled and how to complete them.

1) Details of Subjects


Details of Subjects can be found in **Section 2: General information about the case**. Use the Edit  icon to specify the child's plan


Note: Only the selected family group members (*Primrose and Baby*) are in the **Details of Subject(s)** table. The table is not **editable** at this point. Worker can no longer add a subject to the workflow step or remove one from it.


2. General information about the case												
Details of Subjects												
Name	DOB / EDD	Mosaic ID	Gender	Ethnicity	Religion	Disability	Primary Child	CIN	CP	LAC	Care Leaver	CYPDS
Baby Test	15/07/2021	2192410	Female									
Primrose Test	01/06/2016	2192390	Female	Mixed	7th Day Adventist (Ch)							


Update and 'Save changes' for each child

Details of Subjects

Mosaic ID 

Gender 

Ethnicity 

Religion 

Disability

Primary child for audit

CIN

CP

LAC

Care Leaver

CYPDS

2) Action Plan

The Action Plan table is in **Section 11: Evaluation**. The Auditor records here the recommendations of the Audit.

The screenshot shows the 'Audit Template CSSW (Group) : Test' interface. On the left is a navigation menu with items: 'improving and sustaining outcomes', '5. Engagement with children and their families', '6. Equalities', '7. Outcomes for the child and the family', '8. Management oversight and direction', '9. Recording', '10. Child and family feedback', '11. Evaluation', and '12. Social worker's Comments'. The main area is titled 'Action Plan' and contains a table with columns: 'Subjects', 'Action', 'By whom', and 'By when'. An 'Add' button is located at the bottom right of the table. Below the table is a 'Moderation' section with a 'Was this case moderated?' question and radio buttons for 'Yes', 'No', and 'Partial'. There is also an 'If Yes' section and a 'Discussion and rationale' field.

Click the 'Add' button to open the Action Plan table to record your recommendations as may be applicable to **individual members of the group or multiple members**. Use 'Add and close' to add the last in a list of recommendations

Example 1 : Record action for one of the subjects of the Audit Template (**Primrose**)

The screenshot shows the 'Action Plan' form. At the top is a blue header 'Action Plan'. Below it is a 'Select Subject:*' dropdown menu with three options: 'Baby Test', 'Primrose Test' (which is selected and circled in red), and 'Select all'. Below the dropdown is an 'Action' text area containing the text 'Update basic details such as ethnicity and gender on Mosaic'. Below that is a 'By whom' dropdown menu with 'Social worker' selected. Below that is a 'By when' dropdown menu with '01/08/2022' selected. At the bottom right are three buttons: 'Add', 'Add and close', and 'Close'.

Example 2: Record action for all the subjects of the Audit Template (Primrose) (Primrose & Ella)

Action Plan

Select Subject:*

Baby Test
 Primrose Test

Select all

Action

By whom

By when

Below is a view of a completed **Action Plan** table

Audit Template CSSW (Group) : 🧑‍🤝‍🧑 Test

(0)

	Action Plan			
Subjects	Action	By whom	By when	
Primrose Test	Update basic details such as ethnicity and gender on Mosaic	Social worker	01/08/2022	
Baby Test, Primrose Test	Update details of discussion with Nurse-in-charge to the CP-IS record.	Social worker	17/08/2022	
				Add

3) Next actions (next workflow step)

The Audit Template is a stand-alone workflow step that has a terminating next action named 'Audit completed'.

This means the Template is started as a new work item outside of a workflow on a needs basis.

Worker needs to indicate this for all subjects of the step as shown below.

Next actions

Select action: **Audit completed** ▼

Applies to:

- Baby Test
- Primrose Test
- Select all

Note

Priority

Urgent Normal Low

Add **Add and close** **Close**

Finish step

Audit Template CSSW (Group) : Test

Audit Template CSSW GRP

13. Actions Taken

Next Actions

Next action	Subjects	Assigned to	Reason	Note	Priority	Status
Audit completed	Primrose Test Baby Test					Proposed

Add

Merging Workflow steps (This section is not yet completed)

Individual Case Discussion Reflective Group Supervision

Sections

1. Individual Case/Reflective Group Supervision GRP
2. Actions Taken

indicates completed section

Subject child(ren)

Name	Date of Birth
Baby Test	15/07/2021
Primrose Test	01/06/2016

Individual Case/Reflective Group Supervision (GROUP) : Test

indicates completed section

Sections

1. Individual Case/Reflective Group Supervision GRP
2. Actions Taken

indicates completed section

*indicates required field

Is this:

Individual Case Discussion Reflective Group Supervision

Subject child(ren)

Name	Date of Birth
Test Test	19/08/2019
Primrose Test	01/06/2016

Date of Supervision*

Family Details - Test (144938)

Test, Primrose

Summary Personal relationships Professional relationships Case notes Documents

Family Search:

ID	Name	Date of birth	Gender	Start date	Actions
2192410	Baby Test	15/07/2021 (1 year old)	Female	04/08/2022	<input type="checkbox"/> <input checked="" type="checkbox"/>
2186398	Ella Test	05/07/2017 (5 years old) (Est.)	Female	04/08/2022	<input type="checkbox"/> <input checked="" type="checkbox"/>
2192390	Primrose Test	01/06/2016 (6 years old)	Female	09/06/2022	<input type="checkbox"/>
2075012	Test Test	19/08/2019 (2 years old)	Female	15/06/2022	<input type="checkbox"/>

Showing 1 to 4 of 4 entries [First](#) [Previous](#) [1](#) [Next](#) [Last](#)

Address(es) **Current work**

Primrose Test

Ella Test

Current work

- Individual Case/Reflective Group Supervision (GROUP)** for: Primrose Test ([Yetunde Bright](#))
- Individual Case/Reflective Group Supervision (GROUP)** ([Yetunde Bright](#))

Update on actions from previous supervision

Select Subject:*

- Test Test
 Primrose Test
 Select all

Previous action Background needs to prepop

By whom developer

By when 31/07/2022

Update on progress It did prepopulate.

Save changes

Cancel

Individual Case/Reflective Group Supervision (GROUP) : Test



Individual Case/Reflective Group Supervision GRP

Sections

1. Individual Case/Reflective Group Supervision GRP

2. Actions Taken

indicates completed section

1. Individual Case/Reflective Group Supervision GRP

*indicates requi

Is this:

- Individual Case Discussion
 Reflective Group Supervision

Subject child(ren)

Name	Date of Birth
Primrose Test	01/06/2016

Select source steps to merge from

The following workflow is eligible to be joined to this workflow. The listed subjects of any selected workflow will be added to this step and the incoming work item will be cancelled. The previous step(s) will be linked to this one.

Show 15 entries

Search:

ID	Subject	Assignee	Incoming date	Select
13009361	Test	Yetunde Bright	27/07/2022	<input checked="" type="checkbox"/>

Showing 1 to 1 of 1 entries

First Previous 1 Next Last

OK

Cancel

Individual Case/Reflective Group Supervision (GROUP) : Test



*Indicates required field

Sections

1. Individual Case/Reflective Group Supervision GRP

2. Actions Taken

Indicates completed section

Is this:

Individual Case Discussion

Reflective Group Supervision

Subject child(ren)

Name	Date of Birth
Test Test	19/08/2019
Primrose Test	01/06/2016
Ella Test	

Agreed actions

Test Test

Primrose Test

Ella Test

Select all

Action

By whom

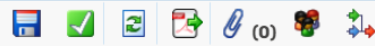
By when

Add

Add and close

Close

Individual Case/Reflective Group Supervision (GROUP) : Test



Sections

1. Individual Case/Reflective Group Supervision GRP

2. Actions Taken

indicates completed section

Next Steps (decisions and actions)

What needs to happen now for this child/ young person? Detail any direct work to be carried out; visits and meetings to be arranged and any joint work with other agencies.

Outline what action is needed, by whom and by when ensuring that actions have a timescale.

Agreed actions

Subjects	Action	By whom	By when
Test Test, Primrose Test, Ella Test	Arrange holiday	Social Worker	22/07/2022
Primrose Test, Ella Test	Arrange meeting with school	Social worker	10/08/2022

Add

Next actions

Select action Next Individual Case/Reflective Group Supervision

Applies to:

- Test Test
- Primrose Test
- Ella Test
- Select all

Send Immediately?

Scheduled Date 19/08/2022

Pass to worker Yetunde Bright

Find

Clear

Assign To Me

Add

Add and close

Close

Individual Case/Reflective Group Supervision (GROUP) : Test



Individual Case/Reflective Group Supervision GRP

Sections

1. Individual Case/Reflective Group Supervision GRP

2. Actions Taken

indicates completed section

2. Actions Taken

Next Actions

Next actions

Next action	Subjects	Assigned to	Reason	Note	Priority	Status
Next Individual Case/Reflective Group Supervision	Test Test Ella Test Primrose Test	Yetunde Bright				Proposed

Add

Chronologies	Demog	Start
Documents	Address	<ul style="list-style-type: none">• IEYS Allocation Meeting
Events		<ul style="list-style-type: none">• IEYS Closure
Visits	Main add	<ul style="list-style-type: none">• IEYS QA Family Support Case File Audit• IEYS Welfare Rights Referral• Individual Case/Reflective Group Supervision• Individual Case/Reflective Group Supervision (GROUP)• Initial Child Protection - Conference• Initial Child Protection - SW Report• Initial child protection conference (I.C)
Education >		
Health >		
Looked after >		
Consent		