

Recording Visits on Mosaic

Current process

Visits are recorded via the **Visit Screen**

Visit Screen is accessed using the **'Visits'** option on the client's **Person Summary** page

The **Person Summary/Visits** option opens the Visit screen for worker to:

- Add (Schedule) a Visit
- Complete a scheduled visit
- Search for/view an historical visit record

Scheduled visits can also be accessed in the **Current Work/Visits** folder.

Transition process

Statutory visits will be recorded using the new **Group enabled Visits workflow** starting from October 31, 2022. The traditional method of recording using **Visits screen** will be disabled from the same date.

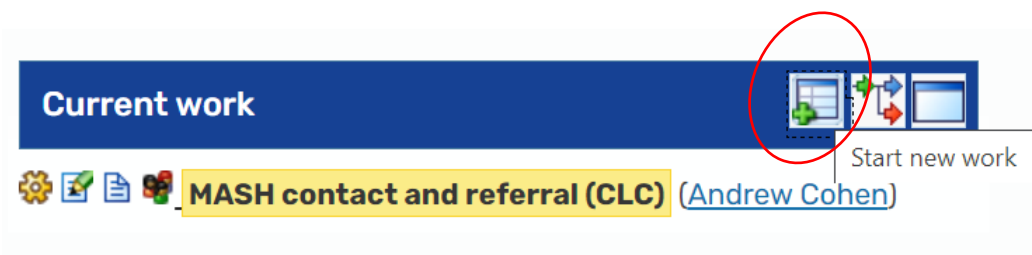
To facilitate that move two things will happen:

1. **Add** option on current Visits Screen will be disabled.
 - Users will no longer be able to schedule new visits or complete previously scheduled ones.
2. Visits screen will still be accessible in a **'View Only'** mode
 - Users will still be able to view but not edit historical visits completed before the transition
 - Record of scheduled but not yet completed visits will no longer be available
3. A **transition step** called **'1. Go_Live: Schedule Statutory Visit(s) (CSSW)'** has been created
 - For users to schedule next statutory visits for clients
 - **Kickstart** the new Visits workflow for subsequent recording and scheduling of Visits
 - Transition step will only be made available for a **temporary period** (to be decided)

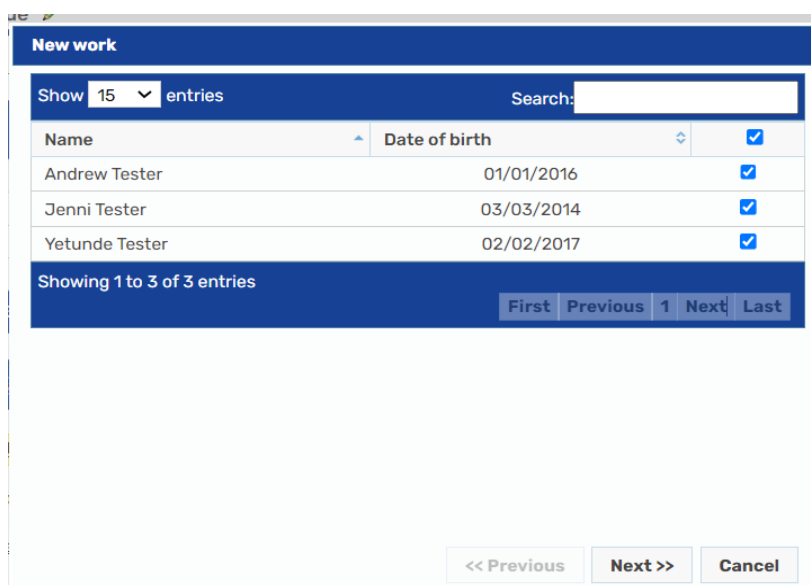
How to move scheduled Visits for open cases to the new Visit workflow step

Using the transition Mosaic visit step: '1. Go_Live: Schedule Statutory Visit(s) (CSSW)'

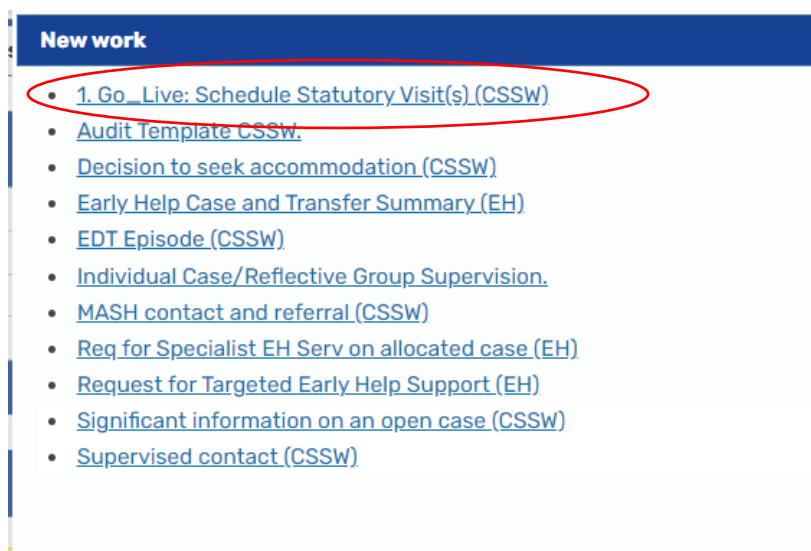
1. Open the family Group Record for the family / Start new work



2. New work window is displayed showing a **list of the family group members**.
 - Choose applicable children. It can be one or more.



3. Click **NEXT** to display the **Start New work** list of possible workflows steps and choose: '1. Go_Live: Schedule Statutory Visit(s) (CSSW)'



4. The '1. Go_Live: Schedule Statutory Visit(s)' window is opened.

Section 1: Details of Visit to be scheduled

- **Details of subject child(ren):** Note that the subject table consist of only the children selected when prompted before the step was started
- **Type of Visit:** Indicate Visit type for each child

1. Go_Live: Schedule Statutory Visit(s) : Tester 2

(0)

Schedule Visit (CSSW)

Sections

1. Details of visit to be scheduled

2. Actions Taken

indicates completed section

1. Details of visit to be scheduled

Details of subject child(ren)		
Name	DOB / EDD	Address
Andrew Tester	01/01/2016	1 Pan Lond N1C 4
Azlaan Basit	22/06/2018	Flat 7 Maiti Lond NW3
Jenni Tester	03/03/2014	1 Pan Lond N1C 4
Yetunde Tester	02/02/2017	1 Pan Lond N1C 4

Type of Visit

Andrew Tester

CIN

CP

LAC

Care Leaver

Azlaan Basit

CIN

CP

LAC

Care Leaver

Jenni Tester

CIN

CP

LAC

Care Leaver

Yetunde Tester

CIN

CP

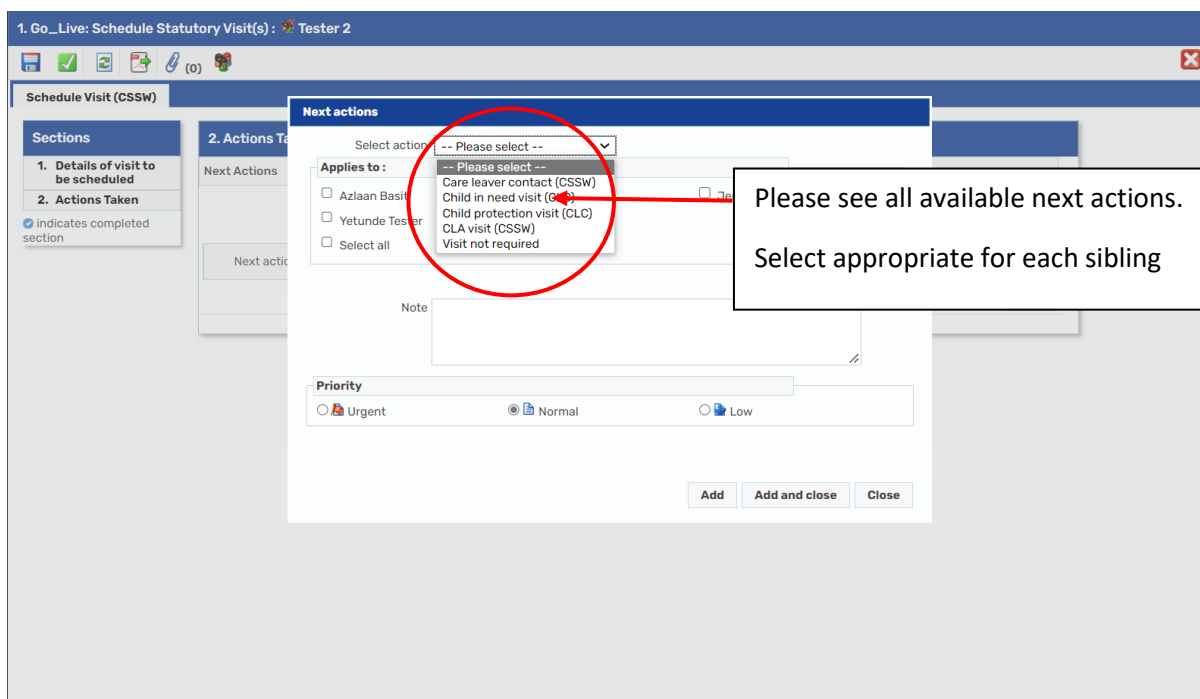
LAC

Care Leaver

Section 2: Next Actions

- Click **'Add'** button to display the Next actions box
- **Select action:** Choose Visit type from the list of possible next actions
- **Applies to:** Choose child/ren the visit type applies to and **'Add'**
- **Scheduled date:** Date of planned visit
- **Pass to Worker:** Allocated worker/worker to complete visit
- Click **'Add'** or **'Add and Close'** depending on if you are adding multiple or single next action(s)

Repeat the above until the applicable next statutory visit has been scheduled for all the children in the family group



Child in need visit for Jenni Tester, scheduled for 12/10/22 and assigned to worker, YBright.

The screenshot shows the "Next actions" dialog box with the following configuration:

- Select action:** Child in need visit (CLC)
- Applies to:** Andrew Tester (unchecked), Jenni Tester (checked), Yetunde Tester (unchecked), Select all (unchecked)
- Scheduled Date:** 12/10/2022
- Pass to worker:** Yetunde Bright
- Priority:** Normal

At the bottom of the dialog box, there are buttons for "Add", "Add and close", and "Close".

Child protection visit for Andrew Tester, scheduled for 12/10/22 and assigned to worker, YBright.

Next actions

Select action: Child protection visit (CLC) ▼

Applies to:

Andrew Tester Jenni Tester Yetunde Tester

Select all

Scheduled Date: 12/10/2022

Pass to worker: Yetunde Bright Find Clear Assign To Me

Note

Priority

Add Add and close Close

Care leaver contact for Yetunde Tester, scheduled for 04/01/2023 and assigned to worker, YBright.

Next actions

Select action: Care leaver contact (CSSW) ▼

Applies to:

Andrew Tester Azlaan Basit Jenni Tester

Yetunde Tester

Select all

Scheduled Date: 04/01/2023


Pass to worker: Yetunde Bright Find Clear Assign To Me

Note

Add Add and close Close

Click **'Close'** or **'Add and Close'** after the last next action needed has been selected.

- This displays the **Next Actions** table shown below.

Click  to finish the step

1. Go_Live: Schedule Statutory Visit(s) : Tester 2

Schedule Visit (CSSW)

Sections

1. Details of visit to be scheduled

2. Actions Taken

indicates completed section

2. Actions Taken

Next Actions

Next action	Subjects	Assigned to	Reason	Note	Priority	Status
Care leaver contact (CSSW)	Yetunde Tester	Yetunde Bright			High	Proposed
Child in need visit (CSSW)	Azlaan Basit	Yetunde Bright			High	Proposed
Child protection visit (CSSW)	Andrew Tester	Yetunde Bright			High	Proposed
CLA visit (CSSW)	Jenni Tester	Yetunde Bright			High	Proposed

Add

Current Work folder on the **Group record/Summary** page will show details of the next action for each child's visit type as shown below.

The screenshot displays a software interface for a user named Loretta Williams. The main content area is titled "Family Details - Tester 2 (145131)" and "Andrew, Yetunde". It features several tabs: "Summary", "Personal relationships", "Professional relationships", "Case notes", and "Documents".

The "Family" section contains a table with the following data:

ID	Name	Date of birth	Gender	Start date	Actions
2192588	Andrew Tester	01/01/2016 (6 years old)	Male	27/09/2022	[Red flag icon]
2191683	Azlaan Basit	22/06/2018 (4 years old)	Male	07/10/2022	[Red flag icon]
2192590	Jenni Tester	03/03/2014 (8 years old)	Female	27/09/2022	[Red flag icon]
2192589	Yetunde Tester	02/02/2017 (5 years old)	Female	27/09/2022	[Red flag icon]

Below the table, it says "Showing 1 to 4 of 4 entries" and includes navigation links: "First", "Previous", "Next", "Last".

The "Address(es)" section lists two addresses:

- Andrew, Yetunde & Jenni Tester**
1 Pancras Square
London
NIC 4A0 (View map)
- Azlaan Basit**
72 Hampstead Road
London
NW1 2NT (View map)

The "Current work" section, highlighted with a red box, lists four items:

- Care leaver contact (CSSW) for: Yetunde Tester (Yetunde Bright)
- Child in need visit (CSSW) for: Azlaan Basit (Yetunde Bright)
- Child protection visit (CSSW) for: Andrew Tester (Yetunde Bright)
- CLA visit (CSSW) for: Jenni Tester (Yetunde Bright)
- MASH contact and refer (CSSW) (Andrew Cohen)

How to complete a *group* Visit workflow step

To complete a **Visit workflow step**, click on the **yellow cog icon** and choose the **Start** option

Current work

- Child in need visit (CSSW)** Jenni Tester ([Yetunde Bright](#))
 - Start**
 - Summary
- MASH contact and referral (CSSW)** ([Andrew Cohen](#))

The Visit step has two sections. (Example below is a CP Visit. Process works the same for all visit types)

Child protection visit (CLC) : Tester 2

Record of statutory child protection visit (CLC)

Sections

- 1. Record of Statutory CP Visit**
- 2. Actions Taken

indicates completed section

1. Record of Statutory CP Visit *indicates required field

Details of subject child(ren)

Name	DOB / EDD	Address	Child or young person seen?	Alone?
Andrew Tester	01/01/2016	1 Pancras Square London NIC 4AG		
Jenni Tester	03/03/2014	1 Pancras Square London NIC 4AG		

Details of visit

Date and time of visit*

Section 1: Record of Statutory CP Visit

- Use the available fields shown below to record details of visit
- Also update the Subjects table above to indicate whether CYP was seen and seen alone

Sections

- 1. Record of Statutory CP Visit**
- 2. Actions Taken

indicates completed section

Date and time of visit*

Venue

Other people seen

Name	Relationship

Observations and summary

Observations

Summary of visit

Visit completed by

Section 2: Record of Statutory CP Visit

Use the **Next actions** box to schedule **next visit** for the subjects of the workflow step.

Finish the step

The screenshot shows a software interface for managing child protection visits. The main window title is "Child protection visit (CLC) : Tester 2". Below the title bar is a toolbar with various icons. The main content area is titled "Record of statutory child protection visit (CLC)". On the left, there is a "Sections" sidebar with two items: "1. Record of Statutory CP Visit" and "2. Actions Taken". The "2. Actions Taken" section is currently selected. A "Next actions" dialog box is open in the center, allowing the user to schedule a visit. The dialog box has a title bar "Next actions" and a "Select action" dropdown menu set to "Next child protection visit". Below this, there is an "Applies to:" section with a list of names: "Andrew Tester" and "Jenni Tester", both of which are checked. There is also a "Select all" option checked. The "Scheduled Date" is set to "19/10/2022". Below the date, there are buttons for "Find", "Clear", and "Assign To Me". A "Note" field is present but empty. At the bottom, there is a "Priority" section with three radio buttons: "Urgent", "Normal" (which is selected), and "Low". At the very bottom of the dialog box are three buttons: "Add", "Add and close", and "Close".