Recording Visits on Mosaic

Current process

Visit 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)
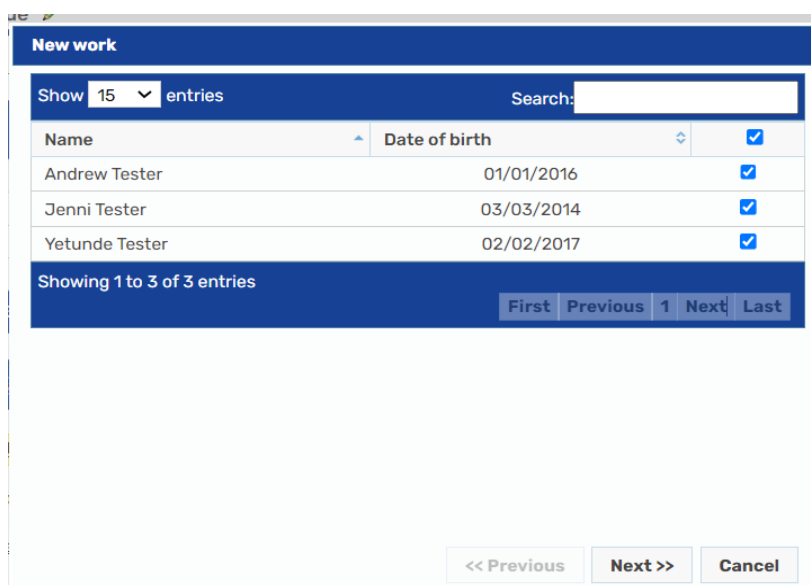
How to move scheduled Visits for <u>open cases</u> to the new Visit workflow step

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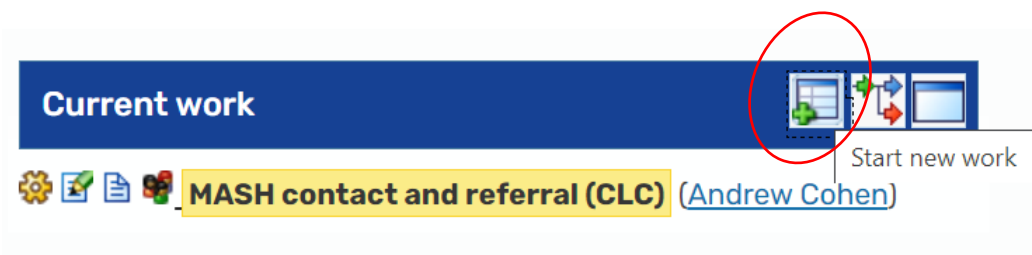
2. New work window is displayed showing a **list of the family group members**.
    *   Choose applicable children. It can be one or more.

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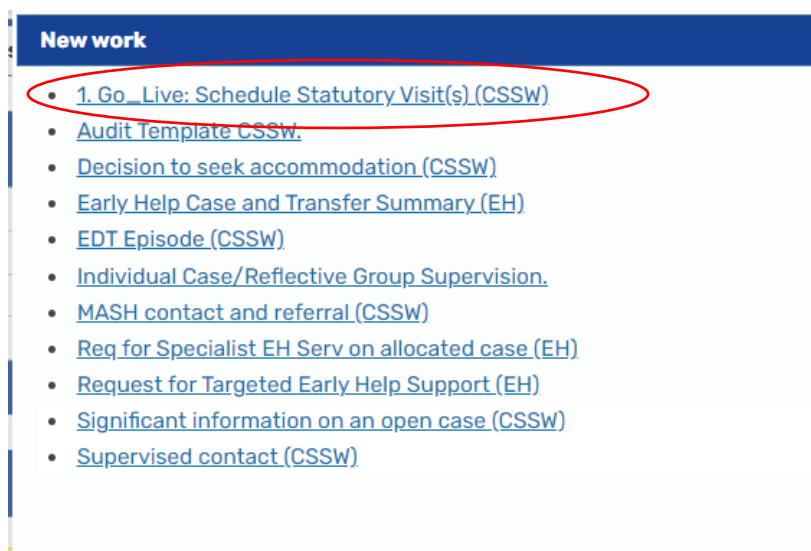
4. The '1. Go_Live: Schedule Statutory Visit(s)' window is opened.

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

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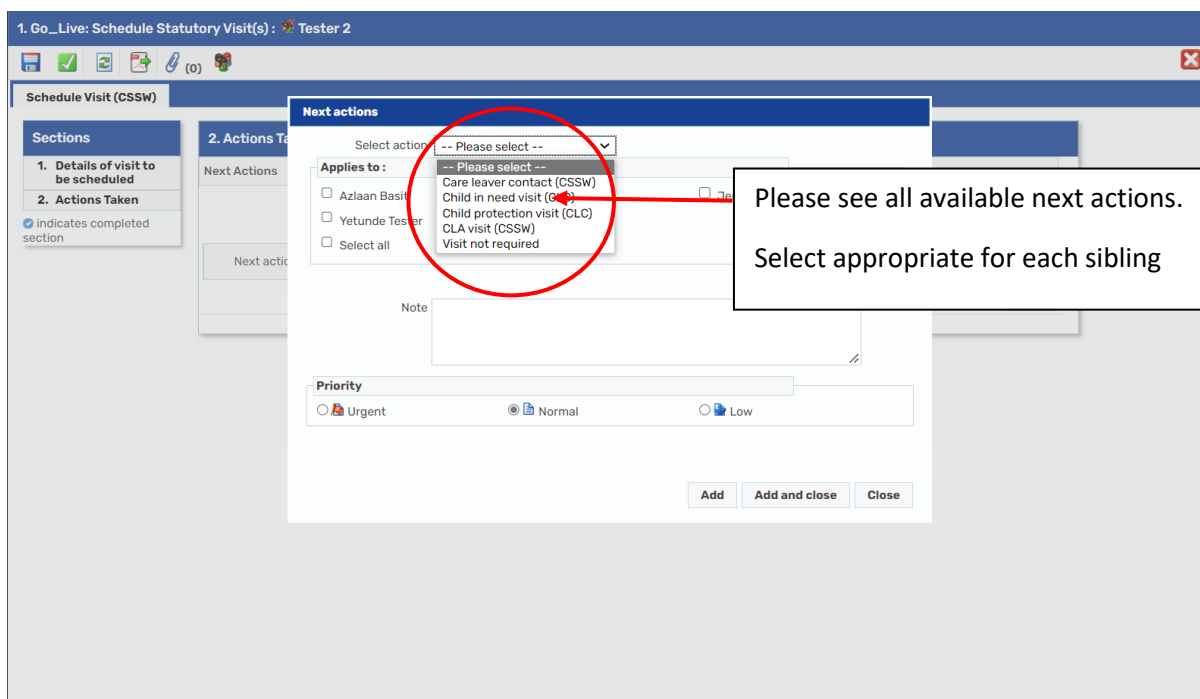
Child in need visit for **Jenni Tester**, scheduled for **12/10/22** and assigned to worker, **YBright**.

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

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

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

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.

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

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

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

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