



## Carer Groups

This guide will show you how to create a Carer Group. The idea of a group is to allow for work to be recorded against the created group. For example in Children's services this is used for sibling groups and assessments are completed for all the siblings in the sibling group. For the Family, Friends and Fostering service, it will be used predominantly for prospective carers. This will allow the work in this process to be recorded against not just one applicant's record but to both without having to copy information to a partner's record. In the past, case information would not be copied and therefore the partner's record may not have any information.

Having a Carer Group will also allow for case notes and documents to be uploaded to the group and appear on both records.

**Person summary - Mrs Female Carer Test (2214232)**

|                                |                                |              |
|--------------------------------|--------------------------------|--------------|
| Person details >               | Summary                        | Case history |
| Start                          | <b>Demographic information</b> |              |
| Case notes                     | Drag                           |              |
| Chronologies                   |                                |              |
| Documents                      |                                |              |
| Events                         |                                |              |
| Visits                         |                                |              |
| Education >                    |                                |              |
| Health >                       |                                |              |
| Legal status                   |                                |              |
| Offences                       |                                |              |
| Registrations                  |                                |              |
| Carer data >                   |                                |              |
| Alerts history                 |                                |              |
| Financial assessment results   |                                |              |
| File management >              |                                |              |
| External system administration |                                |              |
| Restrictions                   |                                |              |
| Carer search >                 |                                |              |
| <b>Groups &gt;</b>             | <b>Create group</b>            | Female       |

Firstly ensure there is a client record for each individual you want to include in the group. Please note, only the prospective carers need to be added in the group. This is not the same as creating and linking in family members such as the client's children.

Go to the client record you wish to form as part of the group. From the Person Summary Screen, click Groups option, then select Create Group



## Create

Fields marked with a \* are required

Title \*

Description

Type \*

☒ Carer
 ☐ Family

☐ Workflow Group

Now add a title. This should be 'Surname' Carers, the Description should highlight the application type e.g. Foster Carer Applicants. Note that this can be changed/edited on the group Summary page using the pencil icon.

Now check the Carer Group Type

Click OK to create the group

The group will now be created and will show the clients name in the group. To add additional people (partner) to the group. Use the 'Add' button by the search bar on the left side of the screen

### Group Summary - Carer - Foster Carer Carers (187652)

Foster Carer Applicants

[Summary](#)
[Personal relationships](#)
[Professional relationships](#)
[Case notes](#)
[Documents](#)

#### Carer

Search:

| ID      | Name              | Pronouns | Date of birth             | Start date | Actions |
|---------|-------------------|----------|---------------------------|------------|---------|
| 2214232 | Female Carer Test |          | 4 Aug 1971 (53 years old) | 6 Aug 2024 |         |

Showing 1 to 1 of 1 entries

[First](#)
[Previous](#)
[1](#)
[Next](#)
[Last](#)

#### Address

Female Carer Test

London Borough Of Camden  
5 Pancras Square  
London  
N1C 4AG  
Cluster team(s): No teams serve this address  
[\(View map\)](#)

#### Current work

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

☐ Use 'sounds like' for last name

Last name#

First name(s)

Flat no.

House no.

Post code#

Date of birth#

Person reference#

Other reference#

Building name#

Street name#

Age from  Age to

#### Context

☐ Adult
 ☐ Child
 ☒ Both

#### Sex (as per Health system)

☐ Male
 ☐ Female
 ☒ Any

Reference type

Class

The find person window will open. Find the person you wish to add to the group using the appropriate fields like name or Mosaic person reference number

MO\_ FPS GROUP\_060921\_GP

Once added the person will appear in the group Summary.

In the group summary screen you can also update Personal Relationships, Professional Relationships, add Case Notes, Upload Documents by selecting the relevant tab. These are similar to use as you would on a individual client record except you will indicate who it applies to in the group.

Group Summary - Carer - Foster Carer Carers (187652)

Foster Carer Applicants

Summary Personal relationships Professional relationships Case notes Documents

Carer Search: Add History Genogram

| ID      | Name                              | Pronouns | Date of birth              | Start date | Actions |
|---------|-----------------------------------|----------|----------------------------|------------|---------|
| 2214232 | <a href="#">Female Carer Test</a> |          | 4 Aug 1971 (53 years old)  | 6 Aug 2024 | X       |
| 2214233 | <a href="#">Male Carer Test</a>   |          | 10 Apr 1968 (56 years old) | 6 Aug 2024 | X       |

Showing 1 to 2 of 2 entries


First Previous 1 Next Last

Address Current work Start work Workflow map History

Female Carer & Male Carer Test

London Borough Of Camden  
5 Pancras Square  
London  
N1C 4AG  
Cluster team(s): No teams serve this address  
([View map](#))

No current work



Under the Current work heading you will see any outstanding work for the group. The three buttons to the right of the Current Work heading will allow you to do the following:

**Start work** Start New Work; Allows you to start a Group piece of work, the individuals in the group will be listed and available for you to select followed by a list of work items that are available for group work.

**Workflow map** View Workflow Map; This will visually show a workflow of current work that has been completed and is currently being worked on

**History** View Work History List; This is useful in seeing a list of all group work that has been completed previously