

Attachment A - Form Completion Guidance prior to 'Go Live' and actions required post 'Go Live'

The following Table describes how work in your trays will be moved from the current Mosaic system to the new Mosaic system post 'Go Live'. We have also used the following colour coding to indicate the stage where you should plan to progress the work of your team.

Green: Minimises rework and risk
 Amber: Avoid if you can as includes rework and hence risk
 Red: Avoid if you can as significant rework and hence risk

Type	Old Style work in Tray	Action post 'Go Live'
Social Work Customer & Carer	Adult Referral	Can be progressed directly onto the new Conversation Record by adding a next action.
	Inbound SIOC/SIOC	Finish and start a new Conversation Record from the Start Menu if required, at point required.
	My Assessment Unstarted (Incoming)	Manager to re-open Adult Referral and cancel assessment <u>OR</u> Manager to cancel Assessment and Practitioner to start new Conversation Record from Start Menu.
	My Assessment Started (Incomplete)	<p>Create a PDF of the old style form without filling in the mandatory fields and save to ESCR under the title "Mosaic System Change Dated 2019 September xx- record of obsolete assessment form"</p> <p>Copy information from the open My Assessment onto Notepad.</p> <p>Start new Conversation Record from the Start Menu, next action send immediately of My Assessment and then transfer any customer information from previously started Assessment from Notepad. Then continue with strength based Assessment.</p> <p>Once you have transferred the customer information and saved the PDF contact ICT Service Desk to request them to delete the old style Assessment.</p>

	<p>My Care and Support Plan Unstarted (Incoming)</p>	<p>Copy any relevant information from the closed My Assessment onto Notepad.</p> <p>Start new Conversation Record from the Start Menu followed by the Assessment and Support Plan. Transfer any customer information from the old style Assessment from Notepad and continue with the strength based My Assessment and My Support Plan.</p> <p>Once you have transferred the customer information, Manager to cancel old style Support Plan.</p>
	<p>My Care and Support Plan Started (Incomplete)</p>	<p>Create a PDF of the old style forms without filling in the mandatory fields and save to ESCR under the title "Mosaic System Change Dated 2019 September xx- record of obsolete support plan form"</p> <p>Copy any relevant information from the closed My Assessment and open My Care and Support Plan onto Notepad.</p> <p>Start new Conversation Record from the Start Menu followed by My Assessment and My Support Plan. Transfer any customer information from the old style Assessment and Support Plan from Notepad and then continue with the strength based My Assessment and My Support Plan.</p> <p>Once you have transferred the customer information and saved the PDF contact the ICT Service Desk to request them to delete the old style Support Plan.</p>
	<p>First Review Unstarted (Incoming)</p>	<p>This is the review determination step. It allows the practitioner to progress directly onto new style My Initial Review.</p> <p>If there is a First Review in the team Review tray (and this should be an ongoing Review) then you can progress to the new style My Review (planned/unplanned).</p> <p>If it is an unplanned review, you will need to start a Conversation Record from the Start Menu, then fill out the unplanned My Review.</p>

	<p>First Review Started (Incomplete)</p>	<p>This is the review determination step. It allows the practitioner to progress directly onto new style My Initial Review.</p>
	<p>Ongoing Review Unstarted (Incoming)</p>	<p>This is the Review determination step. Allows the practitioner to progress directly onto new style My Review</p>
	<p>Ongoing Review Started (Incomplete)</p>	<p>This is the Review determination step. It allows the practitioner to progress directly onto new style My Review (planned/unplanned).</p>
	<p>Unplanned or Planned Review with or without RAS Unstarted (Incoming)</p>	<p>Contact ICT Service Desk to re-open the First or Ongoing Review, cancel the unplanned/planned next action and add the next action of My Initial Review or My Review as required. If this is not possible, Service Desk will start a My Review from the Start Menu.</p>
	<p>Unplanned or Planned Review with or without RAS Started (Incomplete)</p>	<p>Create a PDF of the old style forms without filling in the mandatory fields and save to ESCR under the title "Mosaic System Change Dated 2019 September xx- record of obsolete review form"</p> <p>Copy any relevant information from the open Unplanned/Planned Review onto Notepad.</p> <p>Contact ICT Service Desk to re-open the preceding First or Ongoing Review and add the next action of My Initial Review or My Review as required. If this is not possible, Service Desk will start a My Review from the Start Menu.</p> <p>Start new style My Initial Review or My Review and transfer any customer information from the old style Review from notepad.</p> <p>Once you have transferred the customer information and saved the PDF contact the ICT Service Desk again to request them to delete the old style Review.</p>
	<p>Adult Referral</p>	<p>Can be progressed directly onto the new Conversation Record, at point required.</p>

Sensory	Inbound SIOC/SIOC	Finish and start a new Conversation Record from the Start Menu if required, at point required.
	Sensory Assessment Unstarted (Incoming)	Manager to re-open Adult Referral and cancel assessment <u>OR</u> Manager to cancel Assessment and Practitioner to start new Conversation Record from Start Menu.
	Sensory Assessment Started (Incomplete)	<p>Create a PDF of the old style form without filling in the mandatory fields and save to ESCR under the title "Mosaic System Change Dated 2019 September xx- record of obsolete Sensory assessment form"</p> <p>Copy information from the open My Sensory Assessment onto Notepad.</p> <p>Start new Conversation Record from the Start Menu, next action send immediately of My Sensory Assessment and then transfer any customer information from previously started Assessment from Notepad. Then continue with strength based Assessment.</p> <p>Once you have transferred the customer information and saved the PDF contact ICT Service Desk to request them to delete the old style Assessment</p>
	Sensory Support Plan Unstarted (Incoming)	<p>Copy any relevant information from the closed My Sensory Assessment onto Notepad.</p> <p>Start new Conversation Record from the Start Menu followed by the My Sensory Assessment and My Sensory Support Plan. Transfer any customer information from the old style Assessment from Notepad and continue with the strength based My Assessment and My Support Plan.</p> <p>Once you have transferred the customer information, Manager to cancel old style Support Plan.</p>
	Sensory Support Plan Started (Incomplete)	Create a PDF of the old style form without filling in the mandatory fields and save to ESCR under the title "Mosaic System Change Dated 2019 September xx- record of obsolete Sensory support plan form"

		<p>Copy any relevant information from the closed My Sensory Assessment and open My Sensory Care and Support Plan onto Notepad.</p> <p>Start new Conversation Record from the Start Menu followed by My Assessment and My Support Plan. Transfer any customer information from the old style Assessment and Support Plan from Notepad and then continue with the strength based My Assessment and My Support Plan.</p> <p>Once you have transferred the customer information and saved the PDF contact the ICT Service Desk to request them to delete the old style Support Plan.</p>
	<p>Sensory Review Unstarted (Incoming)</p>	<p>Allows the practitioner to progress directly onto new style Sensory Initial Review Letter or Sensory Initial Review for Monitored Assistive Technology.</p> <p>If the old style letter has been sent and returned, upload and save this to ESCR - 'Mosaic System Change Dated 2019 September xx- record of obsolete Sensory Review form'. Then progress with either deallocation or case closure from this step, adding a note to say saved in ESCR.</p>
	<p>Sensory Review Started (Incomplete)</p>	<p>Avoid - Although the practitioner can progress directly onto the new style Sensory Initial Review Letter it means that the customer will receive the old style letter while you have to input answers against the new style letter.</p> <p>If old style letter has been sent to the customer and the form has been started, upload the old style letter and save it to ESCR.</p> <p>Then progress to new style letter and make a note that the old style letter was sent and this is in ESCR. Then proceed to confirm next actions and send to Team Leader to sign off.</p>
	<p>Adult Referral</p>	<p>Can be progressed directly onto the new Conversation Record, at point required.</p>

Occupational Therapy	Inbound SIOC/SIOC	Finish and start a new Conversation Record from the Start Menu if required, at point required.
	Occupational Therapy Assessment Unstarted (Incoming)	Manager to re-open Adult Referral and cancel assessment and <u>OR</u> Manager to cancel Assessment and Practitioner to start new Conversation Record from Start Menu.
	Occupational Therapy Assessment Started (Incomplete)	<p>Create a PDF of the old style form without filling in the mandatory fields and save to ESCR under the title "Mosaic System Change Dated 2019 September xx- record of obsolete Occupational Therapy assessment form"</p> <p>Copy information from the open My Occupational Therapy Assessment onto Notepad.</p> <p>Start new Conversation Record from the Start Menu, next action send immediately of My Occupational Therapy Assessment and then transfer any customer information from previously started Assessment from Notepad. Then continue with strength based My Assessment. From the Start Menu open Occupational Therapy Supporting Information and transfer information.</p> <p>Once you have transferred the customer information and saved the PDF contact ICT Service Desk to request them to delete the old style Occupational Therapy Assessment</p>
	Occupational Therapy Support Plan Unstarted (Incoming)	<p>Copy any relevant information from the closed My Occupational Therapy Assessment onto Notepad.</p> <p>Start new Conversation record from the Start Menu followed by the My Occupational Therapy Assessment and My Occupational Therapy Support Plan. Transfer any customer information from the 'old style' Assessment from Notepad and continue with the strength based My Occupational Therapy Assessment and My Occupational Therapy Support Plan.</p> <p>Once you have transferred the customer information, Manager to cancel old style Occupational Therapy Support Plan</p>

	<p>Occupational Therapy Support Plan Started (Incomplete)</p>	<p>Create a PDF of the old style forms without filling in the mandatory fields and save to ESCR under the title "Mosaic System Change Dated 2019 September xx- record of Occupational Therapy obsolete support plan form"</p> <p>Copy any relevant information from the closed My Occupational Therapy Assessment and open My Occupational Therapy Care and Support Plan onto Notepad.</p> <p>Start new Conversation Record from the Start Menu followed by My Occupational Therapy Assessment and My Occupational Therapy Support Plan. Transfer any customer information from the 'old style' Assessment and Support Plan from Notepad and then continue with the strength based My Occupational Therapy Assessment and My Occupational Therapy Support Plan.</p> <p>From the Start Menu, start the Occupational Therapy Outcomes and Savings and transfer relevant information from Notepad.</p> <p>Once you have transferred the customer information and saved the PDF contact the ICT Service Desk to request them to delete the old style Occupational Therapy Support Plan.</p>
	<p>Occupational Therapy Review Unstarted (Incoming)</p>	<p>Allows the practitioner to progress directly onto new style My Occupational Therapy Review.</p>

	Occupational Therapy Review Started (Incomplete)	<p>Create a PDF of the old style forms without filling in the mandatory fields and save to ESCR under the title "Mosaic System Change Dated 2019 September xx- record of obsolete Occupational Therapy Review form"</p> <p>Copy any relevant information from the open Occupational Therapy Review onto Notepad.</p> <p>Practitioner can then delete the old style forms within the Occupational Therapy Review (Core Assessment and optional Moving and Handling Risk Assessment form)</p> <p>Practitioner can progress directly onto new style My Occupational Therapy Review</p> <p>Use information from Notepad to re-input into the My Occupational Therapy Review. Practitioner can start the new Moving and Handling and Supporting Information forms from the Start Menu to re-input information from Notepad.</p>
Transitions	Transitions Referral (Children's to Adults)	Can be progressed directly onto the new Conversation Record by adding a next action.

▲ IMPORTANT: In preparation for Go Live, DO NOT progress Adult Referrals or SIOCs onto Assessments if they will not be finished (by the worker or if they will remain on the allocation list when we go live).

▲ IMPORTANT: Only completed documents (assessments, support plans, reviews) can remain on Mosaic as v1. After Go Live. Incomplete documents must follow the pathways above.

▲ IMPORTANT: Use Notepad to transfer information from the old style forms to the new forms. If you don't do this the formatting will be corrupt and you will have to transfer the information again using Notepad.

▲ IMPORTANT: At Go Live, if you are at the stage of completing a My Initial Review, My Carer Initial Review, My Occupational Therapy Initial Review or a My Sensory Initial Review and ongoing support is required, you MUST complete a new style Support Plan with RAS banding.