

Procedure for storing legal documents in Mosaic

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1. Background

- 1.1 Our database Mosaic has not had a dedicated space for legal documents. Therefore staff stored documents in a variety of places which seemed most logical to them at the time. When others have tried finding these documents it has proved time consuming and sometimes extremely difficult to locate, especially in emergencies.
- 1.2 An urgent situation arose on Out of Hours where this was the case and highlighted the need for a new section to be added to Mosaic for clarity moving forward.
- 1.3 The current legal status of an individual can have profound implications for how we support and work with that person, therefore this information must be immediately available to staff members.

2. New procedure

- 2.1 All staff need to adhere to the guidance contained within this document when storing legal documents on Mosaic. We need to establish consistent practice across the department.
- 2.2 It is essential when uploading a legal document that staff select the main Category “Adults Legal documents” and then select the correct title for the particular document from the drop down from the Sub-categories.
- 2.3 The list of documents within the Sub-Categories are extensive and should contain a heading related to your document
- 2.4 The Sub-category “other” has **not** been added to prevent people defaulting and putting documents there. As stated, we are aiming for clarity and swiftness and best practice to enable those urgently seeking legal documentation to find it with ease and for best practice in record keeping.
- 2.5 When a case is allocated for Assessment or Review the Practitioner should take the time to store both current and past legal documents in their new location in Adult Legal documents and under the correct heading. This will ensure ease of access for all staff but also any others who need to look at our files.
- 2.6 A case note should be added to reflect the title of the document and where it has been stored i.e. “Adults Legal Documents” and then under the

appropriate Sub-Category. Case notes are the “backbone” of our work, they tell the story of the persons journey and highlight decisions made along the way. Documents contain greater detail of specific events and case notes should highlight those events and direct the reader to the location of that document. Good file keeping sits at the heart of Good Practice in Social Work/Social Care Practice.

3. Mosaic guidance

In Mosaic Adults Legal documents now have their own categories.

To make sure legal documentation is easy to find and search for please use these categories when uploading any legal documents. If you hold any cases or are reviewing cases please recategorize any legal documents.

Under Documents and attachments in Mosaic click **upload** and choose your document.

The main category should always be **Adult Legal Documentation**

Main Category* **Adult Legal Documentation**

Sub-category

-- Please select --

-- Please select --

Closed Orders

Consultations with legal

Coroner Outcome

Coroners

Coroners Reports

County / High Court

Court of Protection

Deputyship Orders

DoLS

Family Court

Freedom Of Information

Granted / Final orders

JR Requests

LPA Evidence

Legal Emails





Letters (legal)

You will then have a choice of sub categories, choose the most appropriate

Then click upload and close

When you are looking for legal documents you can now **search** by “Adult Legal Documentation” .

Just searching by the word “Legal” will also bring these documents up.

| Show 15 entries | | | | | | Search: legal |
|--|---------------------------|--------------------------|------|----------|------------------------|---|
| Document | Category | Sub-category | Type | Subjects | Date | Actions |
| Legal Test Document.docx | Adult Legal Documentation | Consultations with legal | docx | Ali Test | 13/07/2023 13:15:45 |   |
| Test Document.docx | Adult Legal Documentation | Court of Protection | docx | Ali Test | 13/07/2023 13:05:26 |   |

When **sorting by category** the legal documents will all appear together.

| Document | Category | Sub-category |
|--|---------------------------|--------------------------|
| Test Document.docx | Access Urgent Letter | |
| Legal Test Document.docx | Adult Legal Documentation | Consultations with legal |
| Test Document.docx | Adult Legal Documentation | Court of Protection |

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