

Adults Quick Guide

Lincolnshire Sensory Service Team Workview – Assigning and Starting Work


All workflow steps have to be assigned to a worker or team as appropriate.



Some LSS workflow steps, such as the **Adult LSS Needs Assessments** are assigned to the Lincolnshire Sensory Service (LSS) team.


These cases can be screened and the workflow steps can be assigned (allocated) to the relevant team member by the LSS manager.

Accessing and Using Team Workview

Work assigned to the LSS team can be viewed in the **Current work** section of the **Team workview**.

The **Team workview** is accessed by clicking the **Show team workview** icon  available in **Full** or **Narrow workview**

However, the **Team workview** is easier to view and use when in **Full workview** - click the **Show full workview** icon  (this icon is 'greyed out' when you are in **Full Workview** )

Please note: The **Show team workview** icon changes into the **Show individual workview** icon  and can be used to return to your individual workview

The **Team workview** is split into two sections: **Team summary** and **Current work**.

- Each section displays within the **Full** and **Narrow workviews**. However, the **Full workview** allows for greater functionality.

- Each section can be opened (expanded) or closed (collapsed) by clicking on it.
- If you open a section it will remain open until you close it again or open a different section.
- Only one section can be open at once – opening a section will automatically close the other section, but both sections can be closed at the same time.

Team summary

- The **Team summary** displays as a table. The number displayed in brackets next to **Team summary** denotes the total number of rows in the table.
- The **top row** of the table displays the **allocations** and **workload** for the **team**.
- The **subsequent rows** display the **allocations** and **workloads** for **each member** of the team.
- The information displayed tells us how many **Allocations** each worker has (the number of open worker relationships) and the **Workload** assigned to each worker or the team – how many **Incomplete work**, **Incoming work** and **Future work** steps.
- Clicking on a **worker** hyperlink will show the **Individual workview** for that worker

From here you can then view their **Allocations** section and their **Current work** section to see the work that is assigned to them

The **Team summary** is a useful tool for managers when allocating cases and assigning work.

Current work for the Team

The **Current Work** section is found underneath the **Team summary** and contains the work assigned to the team.

The **Current work** section is split into folders, you will only see a folder if the team currently has at least one item of that work type assigned to it.

The default display for the **Current work** section is to be organised by 'Type' (type of work/task). Work in each folder is displayed by default in ascending order by date.

Potential available work folders for the team (when arranged by 'Type') are:

- **Incoming work** = Workflow step assigned but not yet started
- **Incoming requests** = Contains both requests and notifications.

Requests = tasks such as providing additional information. These must be completed before a workflow step can be finished

Notifications = usually sent purely for information only. They may also instruct you to do a task which does not require a response, e.g. asking Admin to print and post documentation to the person / their representative. These can be acknowledged after the workflow step is already finished, or completed as per requests if the workflow step they have been sent from has not been finished.

- **Future Work** = workflow steps assigned and due to start in the future (scheduled workflow)
i.e. Reviews

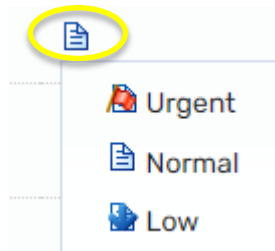
Please note: Alerts and Incomplete work are not available to be assigned to the team so these folders will never be visible in the **Team workview**.

- Clicking on the **person's name** will open the **Person summary** for that person (Mosaic will automatically display as **Narrow workview**).
- Clicking on the **Title** hyperlink will open the **Workflow Step Summary** screen for that workflow step; you can then click **Start** to open the workflow step (without assigning it first) although you will need to click 'yes' in the popup window. See the **Workflow Step Summary** user guide for further details.
- The **Priority** column displays the urgency of the task; a red flag denotes that the task is urgent. You can click the Priority column heading to sort by priority.

If required, you can also change the **Priority** of the work.

To change the priority:

- Left click on the **Priority** icon - a mini menu will display






- Click on the relevant icon to select the new priority required
- The **Date** column displays the date the task was sent / is scheduled for. You can click the Date column heading to sort by date.
- The **Note** column displays notes added to the workflow step when assigned to the worker, team inbox or team. If the note is longer than the text visible on the screen click the text to open it in a separate popup window to view the full note.
- If you hover the cursor over a **work** icon it changes to a **yellow cog** ⚙️ and displays a dialogue box describing what the workflow step is:
- If you left click the **yellow cog** ⚙️ you will see a list of actions you can take, which will vary according to your role and the type of work you are looking at:
 - You can start/resume any work, assigned to you, a member of your team, or your team by selecting '**Start work/Resume work**' from the mini menu.
 - You can re-assign work by selecting '**Update assignment**' from the mini menu. Refer to the **Assigning Work** user guide for full details.
 - You can view the assignment details of any of the workflow steps by selecting '**Assignment history**' from the mini menu. This shows you who assigned the work, where and when.
 - You can click the **Add calendar** option to add an appointment in your Outlook calendar based on the scheduled date of the work

- Depending on your system permissions, you may also be able to cancel **Incoming** and **Future work** by selecting '**Cancel work**' from the mini menu. You will have to record a reason and for audit purposes it would be visible on the record that the work had been added and then cancelled.


Assigning Work

If you are a manager or have another leading role you will be responsible for assigning work to individual workers from the **Team workview**.

In the **Current work** section:

- If needed, click on the **yellow folder**  to view all **Incoming work** assigned to the LSS Team.
- Hover on the **Incoming Work** icon  until it becomes a **yellow cog** 
- Left click this icon to see a list of actions you can take, (remember this will vary according to your role and the type of work you are looking at).
- Click **Update assignment** in the mini menu

An **Update assignment** window displays

- **Team worker** = Select worker from dropdown
- Where applicable, the '**scheduled start date**' may default in as 'today' but this can be amended by using the **date picker** icon , similarly the '**time**' can be amended by typing over the existing time where required.(not routinely necessary)
- **Note** = Optional textbox to add a note for the worker you are assigning the case to if required
- Click the **OK** button. This will assign the work to the worker. The work will display in the worker's **Current work > Incoming work** folder.

Other ways to Assign Work:


- Work can be re-assigned from one worker to another by accessing the worker's **Current work** folders and following the process outlined above.
- There is a **Bulk Assign** button located on the **Current work** section (the team or worker's **Current work**). This button allows one or multiple items of work to be re-assigned to another worker or the team.
- Work can be re-assigned directly from a person's **Current work** section on their **Person summary** screen by clicking the **work** icon and selecting **Update assignment** from the mini menu.

Refer to the **Assigning Work** user guide for full details of these processes.

Recording a Worker Relationship

When assigning work it is also best practice to add a worker relationship for the worker you are assigning (allocating) the work to.

From the **Person summary** screen of the person's record:

- Click **Person details > Worker relationships** in the sidebar menu
- Click the **Add** button
- **Worker** = Click the **Find** button to perform a worker search
- Click on **worker name** hyperlink to pull worker through to **Add worker relationships** screen
- **Relationship type** = Select **Involved Worker**
- **From Date** = Select relevant start date using the **date picker** icon 
- Click the **Save** and **OK** buttons to return to the **Person summary** screen

The details will display in **Professional and organisational relationships**.

The person's details will also display in the worker's **Allocations** section when working in **Full** or **Narrow workview**.

Refer to the **Worker Relationships** user guide for further details.




Starting Work Assigned to the Team

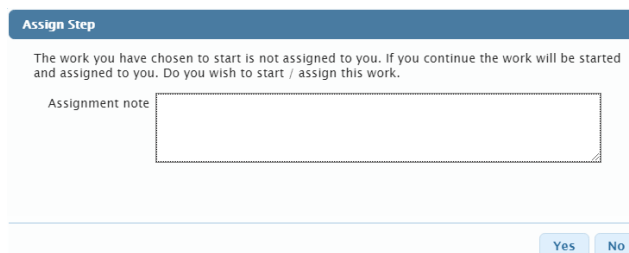
It is recommended you access the person's record (by clicking on the **person's name** hyperlink) to allow you to review the record and any previous workflow steps before starting work.

You can then start the work within the **Current work** section on the **Person summary** screen. Refer to the **Current Work on Person Summary Screen** user guide for further details.

However, work can be started directly from **Team workview** if required.

In the **Current Work** section of the **Team workview**:

- If needed, click on the **yellow folder**  to view all **Incoming work** assigned to the LSS Team
- Hover on the **Incoming work** icon  until it becomes a **yellow cog** 
- Left click this icon to see a list of actions you can take, (remember this will vary according to your role and the type of work you are looking at)
- Click '**Start work**' in the mini menu.
- As the work is assigned to the LSS team the following pop up window will display:




Assign Step

The work you have chosen to start is not assigned to you. If you continue the work will be started and assigned to you. Do you wish to start / assign this work.

Assignment note

Yes No

- Click the **'Yes'** button to open the workflow step. The workflow step will be automatically re-assigned to you when you next click the **Save** toolbar icon  within the workflow step.