

Adults Quick Guide

Searching for a Person, Worker or Organisation

Searches for **people**, **workers** and **organisations** are carried out separately in Mosaic:

- **People** are our customers/clients and members of the general public
- **Workers** are employees of organisations
- **Organisations** are teams within Lincolnshire County Council (LCC), our commissioned partner services e.g. Wellbeing and Lincolnshire Partnership Foundation Trust (LPFT), the NHS and any other agencies e.g. the police or a care provider (residential care home, care agency etc)

Searches for a **person** or **worker** can be initiated from the **Full workview**.

- Click the **Find person** button to perform a person search
- Click the **Find worker** button to perform a worker search

Searches for a **person**, **organisation** or **worker** can also be initiated from the header menu when in **Closed** or **Narrow workview**.

- Click **People > Find person** to perform a person search
- Click **Organisations > Find organisation** to perform an organisation search
- Click **Workers > Find worker** to perform a worker search

Finding a Person

When searching for a person, either click the **Find person** button or **People > Find person** as described above.

The '**Find person**' window opens.

Important notes regarding searching for a person

- Searches can only be conducted if information is entered in at least **one** of the fields marked with the red hash **#**
- A minimum of **2 characters** must be recorded in one of these (mandatory) fields before a search can be performed.
- Less is more when performing a person search – only enter **one type of search criteria** at a time when searching i.e. just name or just date of birth
- The % is a **wildcard**.

The % can be used when searching for a person to replace letters in a word if you are unsure of the spelling e.g. if searching for the last name of 'Parker', you could use the wildcard to replace the 'e' – Park%r

The % is not needed at the end of a word – Mosaic will automatically look for any word starting with the letters recorded within the field e.g. 'PAR' would find someone with the last name PARR, PARE, PARK, PARKER etc.

- The "**Use 'sounds like' for last name**" checkbox can be used to search for all last names which sound like the one entered in the Last name field.

It is recommended this is only used as a last resort as it will take a long time to run a search using this option.

- If searching by **Other reference** (for example NHS number), then the **Reference type** must also be selected from the dropdown menu – Mosaic will prompt you to do this.

Buttons on the Find person window

The **buttons** at the bottom of the '**Find person**' window have the following functions:

- **Find** = Runs the person search using the data you have entered in the form.
- **Last find** = Displays the results from the last search you carried out.

This is only visible if you have already run a search in this session (since signing in to Mosaic).

- **Clear form** = Empties all of the data you have entered into the form.

This is only visible if there is data on the form.

- **Cancel** = Closes the **Find person** window without running a search.

To perform a search

Enter search information (refer to the important notes regarding searching for a person as described above) and click the **Find** button.

The **Find person** window displays with any matching results.

You can type a keyword within the '**Search**' box to filter the screen further where needed.

If the person's record is not displayed in the search results, click the **Find again** button to perform another search using different search criteria.

If the record is not found, after at least three searches using different criteria, you can create it by clicking the **Add new** button.

For further details, see the **Creating a Person** user guide.

If there are several similar search results, hovering the cursor over a row in the results table shows a popup window.

This window displays some of the professionals involved and allows direct access to care package details (services), notes and case notes for that person (where applicable).

If a person has had multiple names or addresses in Mosaic you will see multiple rows for that person within the results table – the ID number will confirm it is the same person.

Whichever row you select to click on will display the person's most current information when you access their record.

If the person has passed away their date of death (as recorded on their record) will display in the **Date of death** column.

If the person has not passed away this column will be blank

Click on the **ID, Name, Address, Date of birth** or **Date of death** (where applicable) hyperlink to access the record – the **Person summary** screen for that person will display.

Finding a Worker

When searching for a worker, either click the **Find worker** button or **Workers > Find worker** as described above.

The '**Find worker**' window / '**Find workers**' screen opens.

Note: The name of the screen / window varies depending on where you are starting the search from but the process for searching remains the same

Important notes regarding searching for a worker

- Searches can only be conducted if information is entered in at least one of the fields marked with the red hash #
- The % is a **wildcard**.

The % can be used in the **Last name** field to display a list of all workers.

It can also be used to replace missing letters but is not required for the end of a word.

- By default the results are restricted to workers that have a current primary role, but you can uncheck the '**Include only workers with a current role**' checkbox to return all workers that match the search criteria.

To perform a search

Enter search information (refer to the important notes regarding searching for a worker as described above) and click the **Find** button.

The results will display.

- If searching from the **Add worker relationship** screen or within a workflow step (using a **Find** button), clicking on the **worker name** hyperlink will select it.

The worker's details will then prepopulate into the associated fields.

- If searching for a worker outside a workflow step, clicking on the **worker name** hyperlink will display their **Worker summary** screen.

This screen contains information about that worker such as job title, roles, and their worker ID number.

If the worker is not listed when you perform a search, you can arrange for them to be added to Mosaic by the Mosaic Service Desk by completing the **Create/Change Organisation** Mosaic requests form.

Searching for a worker to assign work to

A worker (or virtual worker) can also be searched for, to assign a workflow step, request or notification to, by clicking the **Pass to worker > Find** button.

This can be carried out both from within a workflow step and outside of a workflow step, from within **Current work**, **Allocations** and **Recently viewed** folders and the **Current work** section on a Person summary screen (within a person's record).

Clicking on the **name** hyperlink within the search results will select the worker.

Refer to the **Assigning Work** and **Searching for Virtual Worker – Hints and Tips** user guides for further details

Mosaic has been deliberately configured in order to help you assign work to the correct worker.

Therefore, when assigning work to a worker from within a workflow step, where possible, use the '**Pass to worker**' dropdown menu to select the relevant worker.

Refer to the relevant user guides relating to the specific workflow step or team process for further guidance.

Finding an Organisation

When searching for an organisation, click **Organisations > Find organisation** as described above.

The **Find organisation** screen opens

Important notes regarding searching for an organisation

- Searches can only be conducted if information is entered in at least one of the fields marked with the red hash #
- The % is a **wildcard**

It can be used to replace letters in any of the search fields but is not required for the end of the word.

Mosaic will automatically look for any word starting with the letters recorded within the field e.g. when searching for 'Adult Care Boston' typing 'Adu' in the Name field would find any organisation starting with the letters 'Adu' including 'Adult Care Boston'.

- All contracted suppliers/providers for Residential and Nursing; CSL; Day Care; and Homecare are suffixed in Mosaic as follows:

Contract Type	Suffix
Residential & Nursing	RC ; NC ; or RC & NC
Community Supported Living	CSL
Home Care	HC
Day Care	DC

If searching for an organisation to add them as a **supplier / provider** to workflow steps, please ensure you select the supplier name listed with the suffix e.g. **Tanglewood Care Home (Horncastle) RC and NC**.

Please refer to the **Searching for Teams and Organisations – Hints and Tips** user guide for further tips around searching

To perform a search

Enter search information (refer to the important notes regarding searching for an organisation as described above) and click the **Find** button.

The results will display.

If unsuccessful in searching using the **Name** field we would recommend you try the **postcode** or any other address details before deciding that an organisation does not exist in Mosaic.

Any organisations marked as '(Historical)' are no longer active and should not be used for active involvements (relationships).

- If searching from the **Add organisational relationships** screen or within a workflow step, clicking on the **name** hyperlink of the organisation will select it.
- The organisation details will then populate the associated fields.

- If searching for an organisation outside a workflow step, clicking on the **name** hyperlink will display the **Organisation summary** screen.

This screen contains information about that organisation such as address and phone numbers.

If the organisation is not listed when you perform a search, you can arrange for them to be added to Mosaic by the Mosaic Service Desk by completing the **Create/Change Organisation** Mosaic requests form.

If you are searching for an organisation to add them as a **supplier/provider** within purchasing workflow steps, e.g. to add an out of county care home for temporary admissions or permanent residency, and you cannot find them you should email CommercialTeamPeopleServices@lincolnshire.gov.uk

The Commercial Team arrange for all new suppliers/providers to be set up on Mosaic once a signed contract has been received.

Searching for an organisation to assign work to

An organisation (team) can also be searched for, to assign a workflow step, request or notification to, by clicking the **Pass to team > Find** button.

This can be carried out both from within a workflow step and outside of a workflow step, from within **Current work**, **Allocations** and **Recently viewed** folders and the **Current work** section on a Person summary screen (within a person's record).

Clicking on the **name** hyperlink within the search results will select the team.

Refer to the **Assigning Work** and **Searching for Teams and Organisations – Hints and Tips** user guides for further details

Mosaic has been deliberately configured in order to help you assign work to the correct team.

Therefore, when assigning work to a team from within a workflow step, where possible, use the '**Pass to team**' dropdown menu to select the relevant team.

Refer to the relevant user guides relating to the specific workflow step or team process for further guidance.

Find Party

Some workflow steps have fields which ask for workers, organisations and/or people who are involved in the case / a particular activity.

Clicking the **Find** button against these fields opens a **Find party** window.

The tabs at the top of this window can be clicked to search for a **person**, **worker** or /and **organisation**.

Note: Not all **Find party** windows have all three tabs – some only have one or two tabs. It varies depending on what the field is and who is likely to be involved / needs to be recorded.

Each tab displays the same search criteria as the **Find person**, **Find worker** and **Find organisation** screens/windows described above.

To record in 'Find party' fields:

- Click the **Find** button
- Select the appropriate **tab**
- Perform a **search**
- Select the relevant party from the search results by clicking the **name hyperlink**
- Click the **Add** button to pull through the person, worker or organisation into the form.

The **Add** button will sometime also refresh the **Find party** window allowing a further search to be completed, if so click the **Add and close** button to add the person, worker or organisation to the 'parties involved' section of the form.

'**Find party**' fields within forms will also either have a **Manual Input** button or tab.

Manual Input allows details for a person, worker or organisation to be manually entered into a form if they do not exist in Mosaic, but this should only be used as a **temporary** measure.

If the worker or organisation does not exist in Mosaic then the Mosaic Service Desk should be contacted using the appropriate Mosaic requests form to create the worker or organisation.

The worker or organisation can be recorded using the manual input option until they have been created in Mosaic.

If a person does not exist in Mosaic then a record should be created for them. You do not need to contact the Mosaic Service Desk to do this – you should create them yourself.

A person should only be recorded using the manual input option if there is insufficient information to create them as a person in the system.