

## Adults Quick Guide

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### Worker Relationships

Any open, involved worker relationships will be displayed in the top half of the **Professional and organisational relationships** on the **Person summary** screen.

Not all workers involved in the person's case will be added as a worker relationship. However, you will have full visibility of current worker involvements by viewing **Current work** on the **Person summary** screen.

All workers listed in **Professional and organisational relationships** and **Current work** are hyperlinks to that worker's record.

To view further details of all open and any historic (ended) worker relationships:

- Click **Person details>Worker relationships** in the extended sidebar menu or click the **Change** hyperlink against 'Professional' within **Professional and organisational relationships**.

**Note:** The 'Change' hyperlink will only be visible if at least one professional (worker) relationship is already recorded.

The **Worker relationships** screen displays:

If no worker relationships have been recorded this screen will be blank.

Ended relationships will have a date recorded in the 'To Date' column.

## Adding a Worker Relationship

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To add a new worker relationship:

- Click **Person details > Worker relationships** in the extended sidebar menu or click the **Change** hyperlink against 'Professional' within **Professional and organisational relationships**.

**Note:** The 'Change' hyperlink will only be visible if at least one professional (worker) relationship is already recorded.

The **Worker relationships** screen displays

- Click the **Add** button


The **Add worker relationships** screen displays

- Click the **Find** button to perform a worker search. See **Searching for A Person, Worker or Organisation** user guide for full guidance on performing a search.

If a worker is unknown in Mosaic (no search results are found) please contact Mosaic Service Desk using the **Create/Change Professional** form on MyPortal > Mosaic Requests, for the worker to be created.

From the search results click the **worker name** hyperlink to pull the selected worker through.

Complete the fields as follows:

- **Worker** = defaults in based on the worker selected from the search results
- **Relationship type:** =Select from dropdown menu as appropriate
- **From date** = Defaults in – if required this can be amended using **date picker** icon 
- **To date**= Ignore – use to end a worker relationship only
- **End reason**= Ignore – use to end a worker relationship only
- Click the **Save** button, then click the **OK** button to return to the **Person summary** screen

## Editing and Ending a Worker Relationship

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A person's worker relationships should be reviewed during all case activity.

**Important note:** Editing worker relationships should only be undertaken when a recording error has been made e.g. incorrect from/to dates recorded, incorrect relationship type selected, or incorrect worker name selected.

To edit or end a worker relationship:


- Click **Person details > Worker relationships** in the extended sidebar menu or click the **Change** hyperlink against 'Professional' within **Professional and organisational relationships**.

The **Worker relationships** screen displays. Details for all current and historic (ended) worker relationships will be listed:

- Click the **Edit pencil** icon  against the worker relationship you need to end/edit

The **Amend worker relationship** screen displays

Edit or update the fields as appropriate.

- **To date** = Enter using **date picker** icon  if ending the relationship
- **End reason** = Select an appropriate value from dropdown menu
- Click the **Save** button, then click the **OK** button to return to the **Person summary** screen

Ended worker relationship details will become historic and will only be visible in the **Worker relationships** screen.