Children's Services Guide

Guide for Practice Supervisors and Team Managers

In this guide:

Please note
This document is intended to support staff who have attended the Mosaic training course relevant to their role. If you have not attended a relevant course, please contact the Mosaic Children's Training Team . Every effort has been made to ensure that screen shots included are current; there may be some minor differences in look and feel within the system. All data-examples included in this document are fictitious. Any resemblance to real persons, living or dead, is purely coincidental.
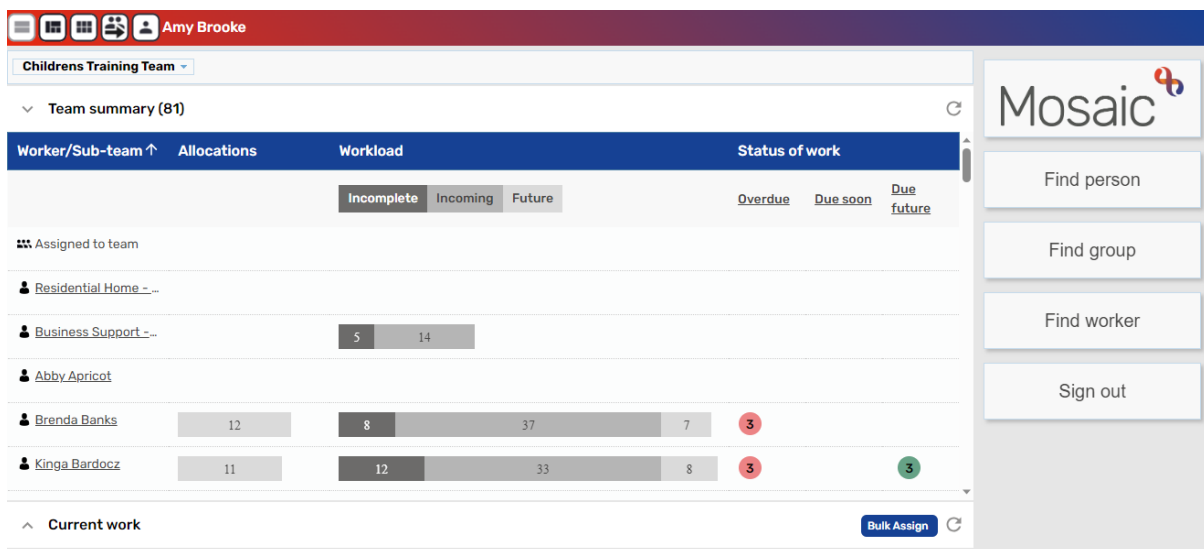
The Team Workview

Workers with managerial access will have the Team workview icon at the top left of the Full or Narrow workview. Clicking on this icon will change the view to display the Team workview.
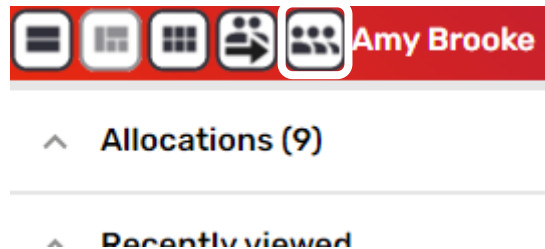
To change back to your own worklist, click the individual icon which replaces the Team icon.

The Team workview is divided into two sections: **Team summary** and **Current work**. These sections can be expanded and collapsed by clicking on the headers.

Using the Team Summary

The **Team summary** gives a concise overview of the workload for the members within your team.

The summary contains a list of the team members, the number of **Allocations** or Worker Relationships for that worker and also a diagram containing the number of **Incomplete, Incoming** and **Future work.**

The column headers of Worker/Sub-team, Allocations and Workload can all be clicked on to filter the list alphabetically or numerically.

To look at an individual worker's Current work in more detail you can click on their name in the list.

The work can be sorted by clicking on any of the headings. **Title** will group worksteps of the same name together. **Subject** list the people by alphabetical order. **Date** will sort the work into date order.

To return to the Team workview, click on the name of the team at the top of the screen.

Reassigning Work

A workstep can be reassigned to another worker or team if any of the following are applicable:

- The workstep has been assigned to the incorrect worker – you should reassign the workstep and **NOT** cancel it
- The case is being reallocated to a new worker within the team
- The case is transferring from one team to another

To reassign the workstep, the manager must move their mouse over the symbol to the left of the workstep title. The symbol will turn into a yellow cog ⚙️ and then click on the cog.

A menu will display and **Update assignment** can be selected.

An Update assignment window will display where you can chose another worker or team to reallocate the workstep to.

- **Team worker** - The dropdown menu will display other workers within your team
- **Pass to worker** – The Find button allows you to find any worker who has access to Mosaic
- **Pass to team** – The Find button will allow you to pass the workstep to another team and the manager of that team can reallocate from their Team's Current work
- **Note** – This can be added to explain why the work has been reallocated to the new Worker/Team

Once the new Worker/Team has been selected, the **OK** button can be used and the workstep will move from the previous Worker's inbox into the new Worker/Team's Current work.

Assigning Work in Bulk

In addition to assigning a single workstep, there is a **Bulk Assign** button in Mosaic which allows you to reassign a single or multiple worksteps to a worker or team at once from within the **Current work** of the Team or a Worker's summary.
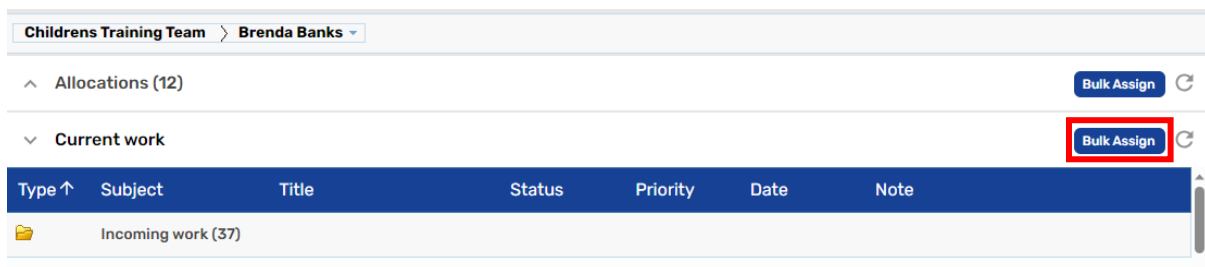
A **Bulk Assign** window appears displaying all the Current work that has been assigned to the worker. This list can be filtered by typing into the Search box and sorted into alphabetical order by clicking on the headers. Individual items can be selected by clicking the check box to their right or clicking on the top check box in the header to select all the current work.

A Worker or Team must then be selected to pass the work item to. If the work is to be allocated to an individual worker within your team, they can be selected from the Team worker dropdown menu. If the work is to be allocated to a worker outside your team or to another team, the **Find** button can be used to search for and select the appropriate option.

Once a Worker or Team is selected, the **Preview Assign** button is enabled.

By clicking **Preview Assign**, the screen refreshes displaying the selected items. If the list is correct, an optional note can be added for the Worker or team receiving the reassigned work. To complete the reassignment, you can click on **Assign.** Clicking on **Cancel** will close the dialog without reassigning the work items.

Please note: There may be occasions when you are unable to reassign worksteps, which is usually because the worker you are trying to assign to does not have the correct permissions to access them. These will be highlighted in red text. If the record is restricted and the worker you are trying to assign worksteps to does not have access to the restricted record, you will need to request access for the worker by contacting Mosaic helpdesk or completing a FreshService form. Once the worker is granted access, you will then be able to assign the workstep to them.

Reassigning Worker relationships in Bulk

There is a **Bulk Assign** button next to **Allocations** which allows multiple Worker relationships to be reassigned at once.
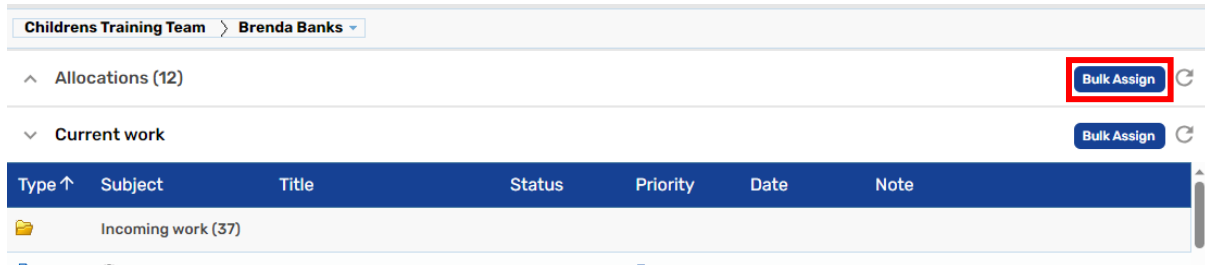
A **Bulk action** window appears displaying all the Allocations that are currently linked to the worker. This list can be filtered by typing into the Search box and sorted into alphabetical order by clicking on the headers. Individual items can be selected by clicking the check box to their right or clicking on the top check box in the header to select all the current work.
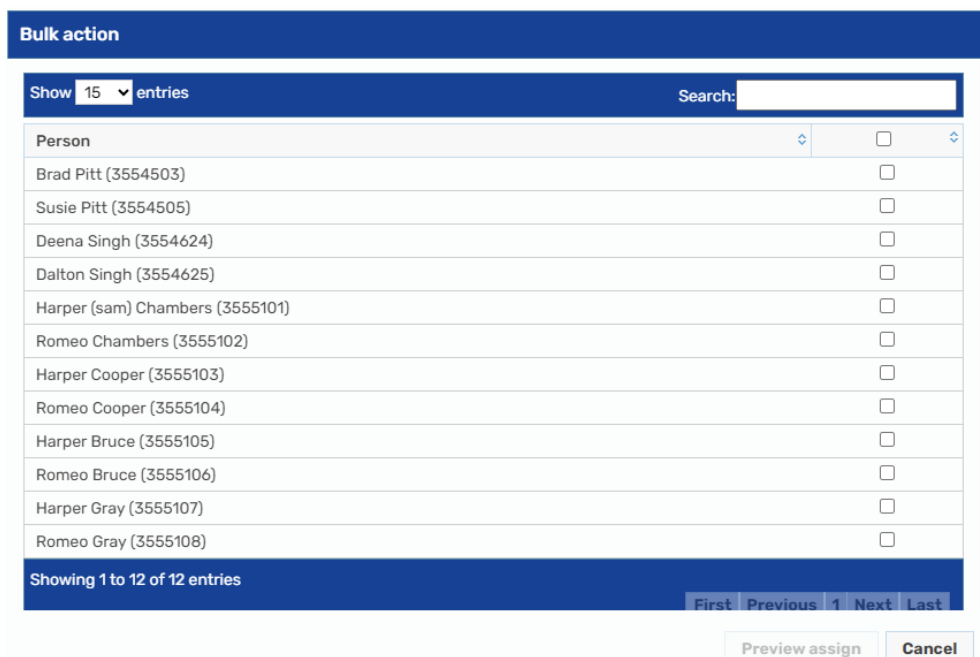
The Team worker dropdown can be used to select a worker within the same team or the **Find** next to Pass to worker can be used to look for a worker outside the team.

Preview Assign will become enabled. Once selected, the screen refreshes displaying the chosen workers. If the list is correct, an **End reason** will need selecting from the dropdown list. Clicking on **Assign** will **end** the relationship between the current worker and the clients selected and add a new relationship with the new worker. They will automatically appear in the new worker's Allocations.

Cancelling Worksteps

Some Worksteps contain a Next action of No Further Action (NFA) which ends the strand of the workflow. However, in some cases, such as Visits, a further Visit must be added as a Next action for you to Finish the workstep.

In this circumstance, if the step is no longer required, the step must be cancelled by the Practice Supervisor or Team Manager.

To be able to cancel a workstep, the work must be in either Incoming work or Future work. Any Incomplete work which needs ending must either be completed or deleted through the Helpdesk. Worksteps that have information added should be completed where possible with an appropriate next action such as NFA or scheduling a further step for it, which can be then cancelled from Incoming or Future work.

To cancel a workstep, the manager should move their mouse over the symbol to the left of the workstep title. The symbol will turn into a yellow cog 🔧 and then click on the cog. A menu will display giving the option to **Cancel work**.
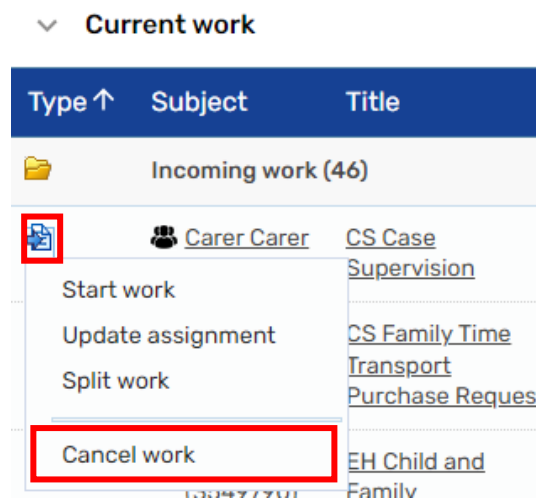
Clicking on Cancel work will display a new window. A **Reason** for cancelling the work must be selected from the drop-down options and any extra information should be added to the **Note** field below.

Clicking **OK** will remove the work from the Current work and end the branch of workflow.

Please note: Cancelling work will remove it completely from the person's record. Looking in the Workstep summary of the previous step will show that the cancelled workstep was added and then removed.

Do not cancel worksteps that have been assigned to a worker in error, please follow the steps outlined above to reassign the work to the correct worker.

Cancelling Worksteps should only be done when appropriate to do so. Every workflow which progresses past the Request must have a Case Closure. Any workflows which are ended incorrectly through the cancelling of steps will appear on reports and will need to be rectified.
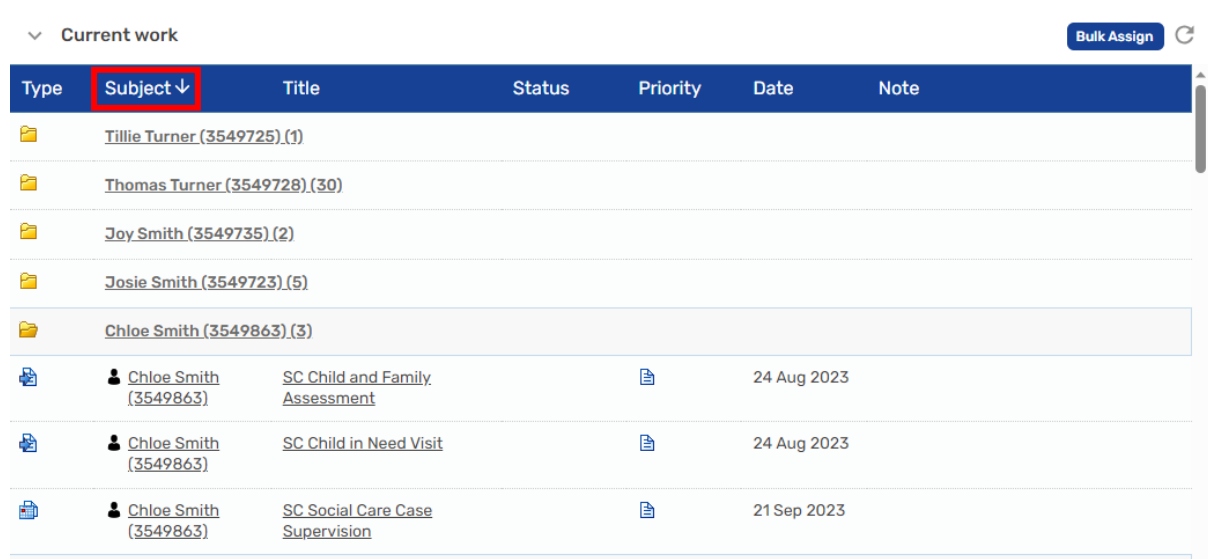
Analysing the Team Summary

Practice Supervisors and Team Managers can use the Team summary to gain an overview of the workers' caseload. If there is a high number of worksteps, this could be an indicator of outstanding work that needs cancelling or finishing.

If there is a high number of **Incoming work**, this is work that has not yet been started and could be holding up other services from progressing with their workflow.

Clicking into a team member will show the work they have in more detail. If the worker has several **Incoming requests** that have not been actioned, this could be holding up other services from finishing their work.

A Worker's summary can be filtered using the hyperlinks in the dark blue header bar.

Filtering by **Subject** will group all the work by client and clicking on the folder will reveal the worksteps open for the worker for each person they are working with.

This enables you to check the correct work is open to the worker for completion. For example if a Social Worker has both Child Protection and Child in Need steps open on a child, but they should only have one or the other. The manager can use the Workflow Map on the Person summary page of the client to identify whether the child is a Child in Need or subject to a Child Protection plan and the steps which are no longer needed can be cancelled.

Request for Services to the Team

All teams using Mosaic have a **Request** for their service. This will usually be a Next action from the **CS Childrens Services Contact, CS Placement Request, CS Internal Contact** or **SC Social Care Contact Screening**. Some Requests are also available from the Start menu. The Request will be sent into the Team workview for a person with a managerial role to review and then allocate the next actions to a worker.

Worksteps allocated to the Team can be found in the Team workview under the **Current work** tab.

The manager should start the Request steps that are in the Current work. As the workstep is allocated to the Team rather than the manager, when starting the step the **Assign step** window will appear. Clicking **Yes** will reallocate the step from the team over to the manager.

The manager must then assess the information within the step and decide whether the referral should be accepted by the service.

- If the referral is to progress, the manager must add the appropriate actions within **Next actions** and allocate them to a worker within their team. There are inclusive rules attached to the next actions meaning that if you select one action, it will advise you of the other steps that must also be selected.
- If the referral is not suitable, the manager can add a **No Further Action or NFA** workstep in Next actions.

In some Requests, the manager has the option of using the Clipboard Request to notify the Referrer that the request has been accepted or rejected by the team.

Once the Request has been reviewed with any appropriate information entered and the next actions selected, the manager must click the ✅ icon to finish the step to open the Next actions to the allocated worker.
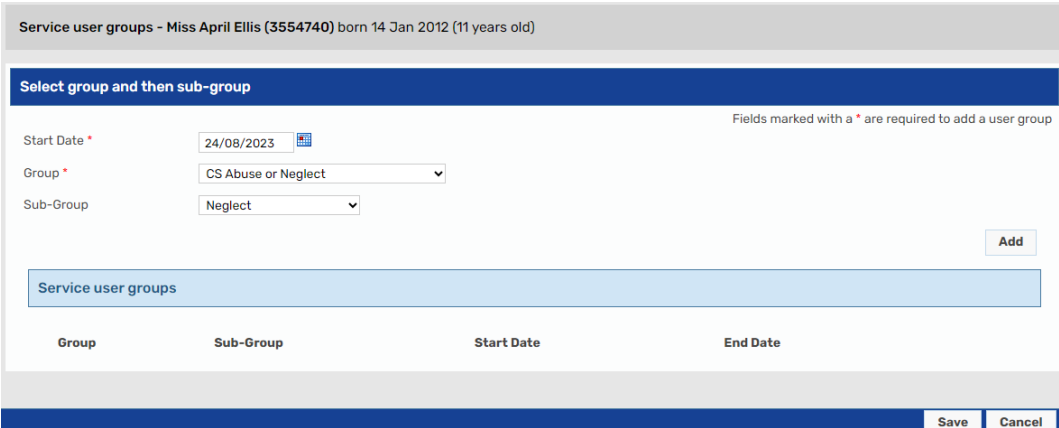
Allocation Process

Once a referral has been accepted into a team, there are three further processes a Practice Supervisor or Team Manager should undertake (depending on the service).

Service User Groups

The manager must add a Service user group to identify a reason why the client is receiving a service from their team. There may be multiple Service user groups added to a client and there must always be one recorded as the **Primary** group.

To add a Service user group:
- Click **Person details** > **Service user groups**
- Enter a **Start Date**
- Select the **Group** and **Sub-Group** from the drop-down menus
- Click the **Add** button

The Service user group added will appear in the table below. If multiple groups have been added, you can change the **Primary** group by moving the selection up using the set as Primary group icon 🔼 at the end of the row until it appears at the top of the list.

Please note: If Social Care are involved in the case their Service user group should always be the **Primary** option.

To save the selection, click **Save** and you will return to the **Person summary** screen.

To end the Service User Group, re-enter the Service user groups screen and click on the 🔴 end icon at the end of the row to add an end date for the group.
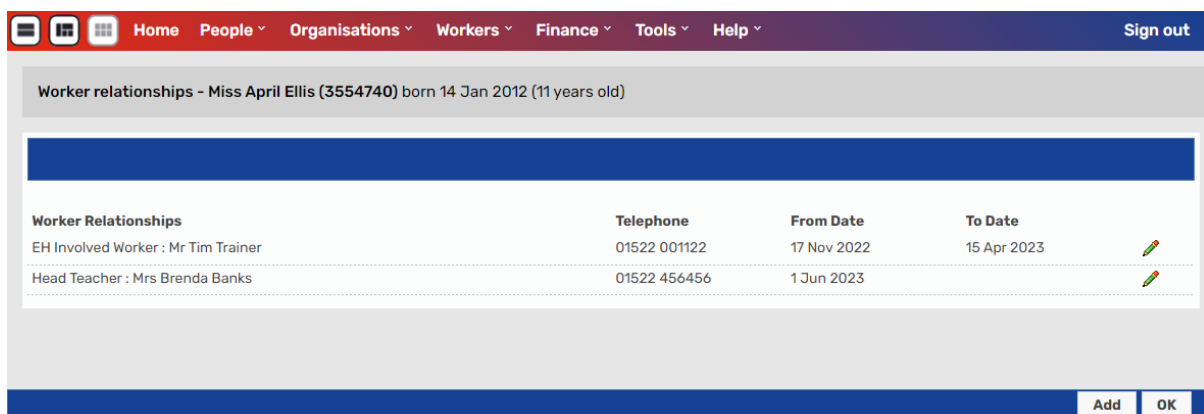
The manager is responsible for adding on the first Service User Group which relates to the reason why their team are providing a service. When the work has been allocated to a worker, it is the worker's responsibility to ensure it is up to date.

Worker Relationship

The manager can add a Worker relationship for the worker who has been assigned the case to so that the client's name will appear in the worker's **Allocations** on the **Full or Narrow workview**.

To add a Worker relationship:

- Click **Person details > Worker relationships**
- Click the **Add** button

- The **Add worker relationship** screen will display

- Click **Find** button and search for the worker using their **Last Name** and/or **First Name**
- Click the **name of the worker** when it appears in the search results
- Select the relevant relationship type from the **Relationship type** drop down menu. At least one **Key Worker** should be present within the Worker Relationships. For a Social Worker for example, their relationship type would be **Key Worker (Childrens Social Care).** If there is a Social Worker involved, other professionals using Mosaic can use the relationship type of **Involved Worker**. The only exception to the rule is if SEND are involved, then they would add a relationship type of **Key Worker (Childrens SEND)**
- The **From date** field will automatically populate with today's date. This date can be changed and should reflect the date the relationship started
- If **Key Worker (Childrens Social Care)** is selected, a new field displays which is mandatory requiring a **Start Reason** to be added from a drop down.
- The **To date** and **End reason** can be amended later to reflect when the relationship is ending.

Organisational Relationship

As well as a Worker relationship, the manager can add on an Organisational relationship for their team which can be used for reporting purposes.

To add an Organisational relationship:
- Click **Person details > Organisational relationships**
- Click the **Add** button
- Click the **Find** button and enter in **Name** the name of the Team. When searching for an Organisation or Team, it is advisable to use the wildcard which is the **%** and enter only key words.

- Click on the **name of the Team** when it appears in the search results

- Select the relevant relationship type from the **Relationship type** drop down menu. At least one **Key Team** should be added within the Organisation Relationships. For a Social Worker for example, their relationship type would be **Key Team (Childrens Social Care).** If there is a Social Worker involved, other teams which input into Mosaic can use the relationship type of **Involved Team**. The only exception to the rule is if SEND are involved, then they would add a relationship type of **Key Team (Childrens SEND)**
- The **From** field will automatically populate with today's date. This date can be changed and should reflect the date the relationship started
- The **To** date can be amended at a later to reflect when the relationship is ending.
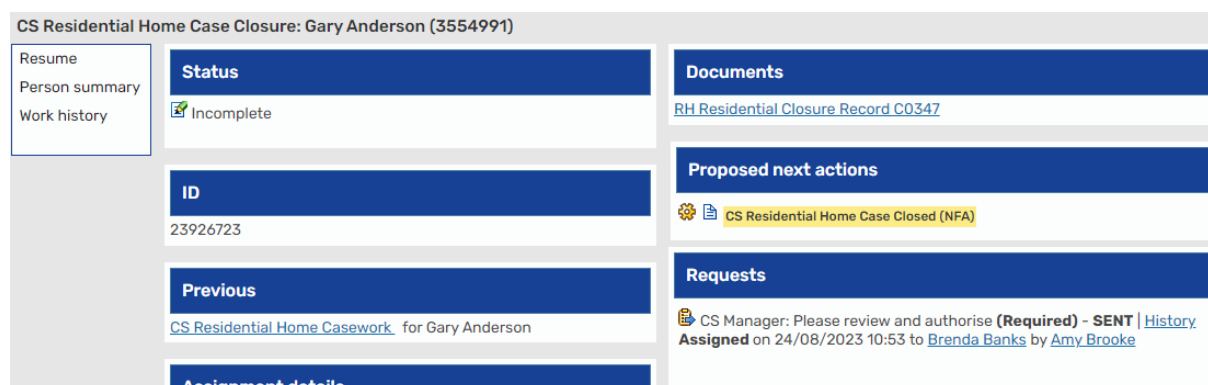
Authorising Workflow Steps

There are workflow steps which contain mandatory or optional Clipboard Requests. In some worksteps, these Clipboard Requests are to be sent to the manager for authorisation. The workflow cannot progress until the manager has marked the Clipboard Request as **Completed** and authorised the step. The worker must initiate the authorisation by sending a Request from the workstep and pass this to the relevant named Practice Supervisor or Team Manager. This Request will display in the **Incoming requests** folder of the Practice Supervisor or Team Manager's **Full or Narrow workview**.

There are two kinds of Incoming requests; Requests and Notifications. Further details on the types and how they are used can be found on the Viewing and working with requests and notifications guide [Viewing and working with requests and notifications](#)

To authorise a request displayed with the request icon , click on the title of the Incoming request. This opens the **Workstep summary** that the request relates to.

To review the Workflow step and to authorise it, click **Resume.** The Workflow step will display.

The **Requests** icon is highlighted red denoting that there is a Request that is waiting to be completed or returned.

The workstep can be reviewed by clicking on each section. To authorise, click on the **Request** Icon. The request(s) will display in red text (below).
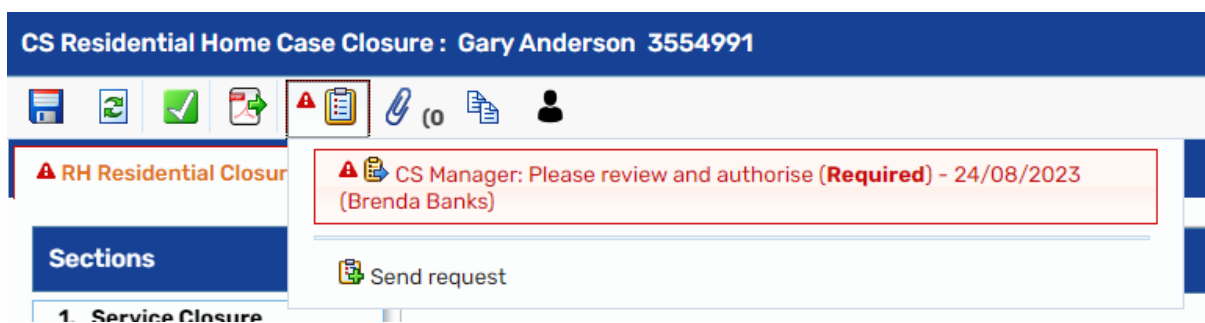
Click on the red text box to open the **Sent request**.

To authorise the step, click **Completed** and **OK**. The workflow step screen displays, click save icon and the step is authorised.

If a workstep has an authorisation request, the manager should always Finish the step using the finish icon to prevent another worker changing the information they have approved. Finishing the step sends the proposed next actions and seals the step as read only.

If the step cannot be authorised, click **Returned**. A Note can be entered to give a reason as to why the step cannot be authorised then click **OK**. The request will be returned to the worker along with the note once the step is saved and then closed using the close icon . Returning a workstep will not allow anyone to **Finish** the workstep. To Finish the step, the clipboard request must be marked as Completed. This may mean the manager or worker needs to amend information within the form or change the Next actions before the manager will authorise the step.