

# Viewing and Working with Requests & Notifications

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## **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.

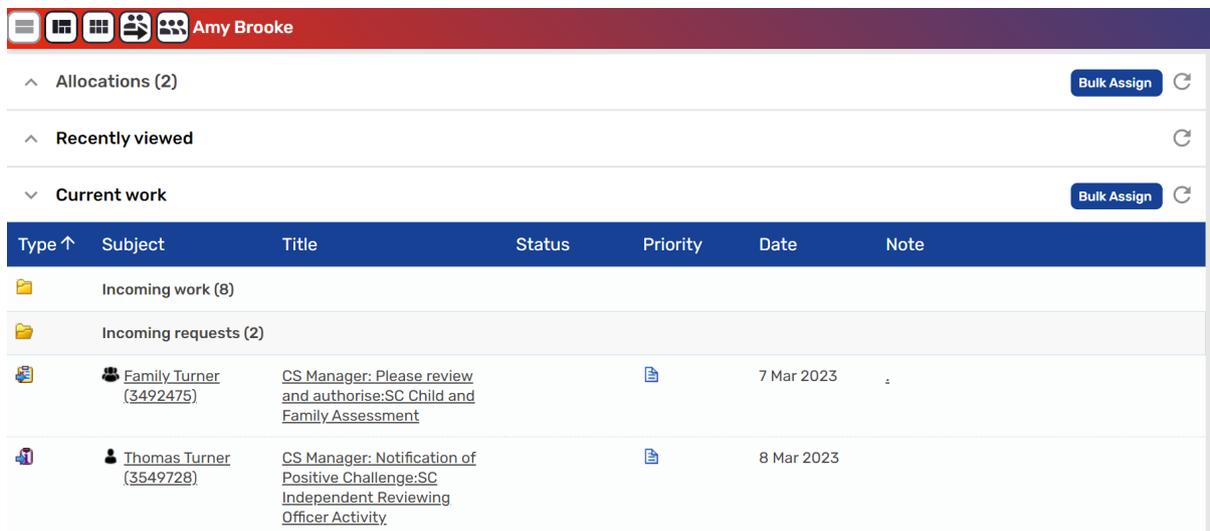
## Working with Requests & Notifications

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A **Requests** or **Notification** can be sent in Mosaic to:

- Gain a manager's authorisation
- Ask another Mosaic User to complete a task
- Notify another Mosaic user that information has been recorded that they need to be aware of

Request and notifications can only be viewed within the **Current work** folder. If you work from the Allocations folder, Person or Group summary screens you will not be able to see any that have been sent.



The screenshot shows the Mosaic interface for user Amy Brooke. It displays a navigation menu with 'Allocations (2)', 'Recently viewed', and 'Current work'. The 'Current work' section is expanded, showing a table of requests and notifications. The table has columns for Type, Subject, Title, Status, Priority, Date, and Note. There are two rows of data, each with a request icon.

Type ↑	Subject	Title	Status	Priority	Date	Note
	Incoming work (8)					
	Incoming requests (2)					
	<a href="#">Family Turner (3492475)</a>	<a href="#">CS Manager: Please review and authorise:SC Child and Family Assessment</a>			7 Mar 2023	
	<a href="#">Thomas Turner (3549728)</a>	<a href="#">CS Manager: Notification of Positive Challenge:SC Independent Reviewing Officer Activity</a>			8 Mar 2023	

Requests will display with a  Request icon.

**Please Note:** If you have been sent a Request this means that someone is waiting for your response and they may not be able to progress the workflow. If Requests are not '**Completed**' in a timely manner, the step cannot be '**Finished**' and '**Next Actions**' will not be sent as required.

Notifications will display with a  Notification icon.

Click on the title of the Request or Notification to open the summary page for the workstep. The screen will refresh to display the workstep summary screen.

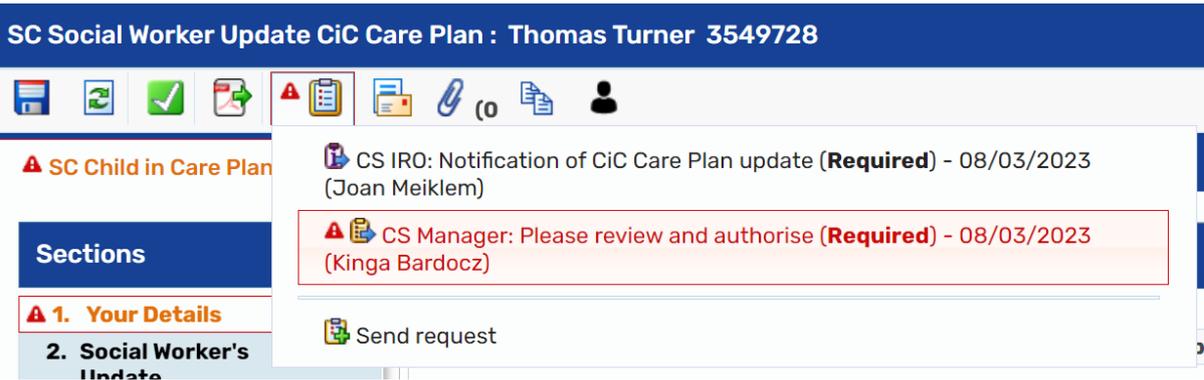
Within the **Summary** page, there is a box entitled **Requests**.

Any Requests or Notifications which have been 'Completed' will have a green tick the  completed request icon, any that are outstanding for completion will display a blue arrow on the  sent request icon.

In the example above there is one Request that requires completion before the step can be finished and the Proposed Next Actions will be sent to the assigned worker.

The worker should then click **Resume** from the left hand menu to enter the workstep.

Once the worker is within the workstep, they will see that the clipboard is highlighted in red showing action is required. Click on the  requests icon from the top menu and find the **Request** that is assigned to you. It will display as highlighted in red as in the example below. If the workstep is open, **Notifications** can be accessed in the same way but will be not highlighted in red.



Click on the text that has your name displaying against it. This will open the **Sent request** window.

The "Sent request" window displays the following information:

- Request ID:** 1312904
- Request type:** CS Manager: Please review and authorise (Required)
- A yellow banner with a warning icon and the text: "You may complete or return the request."
- Status** section with two radio buttons: "Completed" and "Returned".
- A **Note** field with a text area for input.
- Status history** table:

DateTime	Action	Worker/team	Note
08/03/2023 09:34	Sent to	Kinga Bardocz	

At the bottom of the window are three buttons: "Reassign", "OK", and "Cancel".

Tick the option of either '**Completed**' or '**Returned**'. Returned would be selected when you require more information before finishing the workstep and the **Note** field should be used to record what is required.

Once the appropriate option has been selected, click **OK**. The clipboard should no longer be red. If it is, further Requests may need to be sent or require completion by yourself or other workers.

When you have completed the request sent to you, click on the  save icon to **Save** and then close the step. The owner of the step will now be able to **Finish** as and when required.

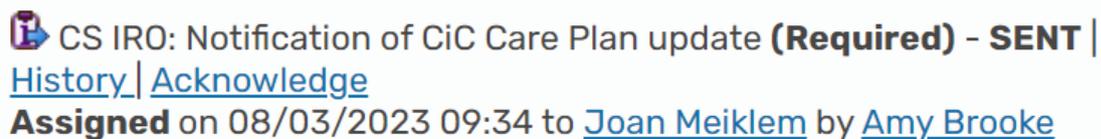
**Please note: Authorisation Requests should be the final activity in the step as once authorised the step should be immediately finished so no-one else can access and amend information after authorisation. If any other requests are outstanding they will still be highlighted in red and must be completed first BEFORE authorisation.**

Once all the Requests have been actioned and you have authorised the request within the clipboard, click on the  finish icon to Finish the workstep. The Proposed Next Actions will now be sent to the assigned workers.

## **Acknowledging Notifications on Finished worksteps**

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Once a workstep has been finished the workstep will be closed and any Notifications outstanding can be **Acknowledged** by accessing the **Workstep summary** screen.



 CS IRO: Notification of CiC Care Plan update **(Required)** - **SENT** | [History](#) | [Acknowledge](#)  
**Assigned** on 08/03/2023 09:34 to [Joan Meiklem](#) by [Amy Brooke](#)

Notifications that require attention will display within the **Incoming requests** folder with a  notification icon.

Click on the title of the Notification to open the summary page for the workstep. The screen will refresh to display the workstep summary screen.

Within the **Summary** page, there is a box entitled **Requests**.

Any Notifications outstanding for completion will display a blue arrow on the  notification icon.

Click on the hyperlink **Acknowledge**, the screen will refresh to display the **Acknowledge notification** window.

**Acknowledge notification**

**ID:** 1312905

**Type:** CS IRO: Notification of CiC Care Plan update

**Note:**

The **Note** field can be used to record why you are acknowledging this Notification if required. Then click **OK**.

The Notification will no longer appear in the workers Incoming requests.

Any text that was entered into the **Note** field will appear next to the **Notification** in the Workstep summary screen.

The Notification will now display with a green tick  completed notification icon to denote that it has been completed.

## Working with Returned Requests

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A Request for authorisation that has been sent from within a workstep can be **Returned** by the authoriser if further information is required or more work needs to be completed.

For example, if an assessment or a Purchase Request has not been completed in full, this can be **Returned** and the worker can be asked to record more information before the authorisation is completed.

Any Requests that have been Returned will appear within a workers **Current Work** under the **Incomplete Work** section highlighted in Red and will require attention.

Type ↑	Subject	Title	Status	Priority	Date	Note
📁	Incoming work (8)					
📁	Incoming requests (1)					
📁	Incomplete work (11)					
👤	Family Turner (3492475)	SC Child in Need Visit			23 Feb 2023	
👤	Family Turner (3492475)	SC Child and Family Assessment			23 Feb 2023	

Clicking on the text hyperlink will open the **Workstep summary** screen.

Details of any **Requests** that have been sent and **Returned**, including the reasons why will display here. Clicking on **Resume** will open the workstep.

Once the amendments are recorded as required and you are ready to send the workstep to be authorised again, click on the 📄 requests icon from the top menu. Find the **Request** that has been returned to you. It will display as highlighted in red with the 📄 returned request icon as in the example below.

Click on the red line of text, the screen will refresh to display the **Returned Request** screen.

### Returned Request

**Request ID :** 1312857

**Request type :** CS Manager: Please review and authorise (**Required**)

 You may send this request again.

**Status history**

DateTime	Action	Worker/team	Note
08/03/2023 09:44	Returned by	Amy Brooke	Please add more information to Section 7
07/03/2023 16:03	Sent to	Amy Brooke	.

Click on **Send again**, the screen will refresh to display the **Resend Request** screen.

The **Note** field will pre-populate with text that was entered by the authoriser when the workstep was **Returned** and can be updated as required.

**Find** the authoriser you wish to send this workstep to. Then click **OK**, and **Save** and **Close** the workstep.

The workstep will now display in your **Current work**, under **Incomplete work**, highlighted in yellow until the authoriser has **Completed** the Request.

**Please note:** Any sent clipboard requests must be marked as Completed to allow the worker to Finish the workstep. Marking a Request as Returned will not allow the workstep to be Finished.