

Creating Groups & Merging Worksteps

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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.




Introduction

Group recording in Mosaic enables information to be recorded and viewed on multiple subjects in a single workstep. Groups have their own unique ID number, this does not form a separate record but brings a collection of records together.

There are two types of Groups currently in use within Mosaic. We use **Family** Groups when we are providing a support service to a group of people, these are used by a wide variety of teams. These should just contain children and young people. **Carers** Groups are used by Fostering and Adoption teams to record against anyone that is either applying or approved to provide a service to those teams as a Foster Carer, Reg 24 Carer (also known as a Connected Person Carer) or Adopter.

Please note: Children and young people should never be added to **Carers** groups. Adults should not be added to **Family** groups. This is to avoid any data breaches and recording unnecessarily on related people.

When information is recorded in a group form, it is saved against the individual records for every person listed within the subjects table at the start of the form.

Mosaic ID	Name	DOB / EDD	Address	Child Seen	
3549723	Josie Smith	14/06/2015	105 Witham Wharf Brayford Street Lincoln LN5 7DH	Visit took place - Child seen alone	
3549735	Joy Smith	03/10/2022	105 Witham Wharf Brayford Street Lincoln LN5 7DH	Visit took place - Child seen alone	
3549724	Johnny Smith	03/09/2020	105 Witham Wharf Brayford Street Lincoln LN5 7DH	Visit took place - Child seen alone	

If additional subjects need to be added, they can be merged into the workstep if the correct worksteps and Group memberships are in place on all the people concerned.

Prior to merging worksteps, it is best practice to check whether a Group already exists within the family. If it does this can be added to, if it does not, a new Group can be created.

If Group membership changes resulting in subjects needing to be removed from worksteps, please follow the guide for **Splitting Worksteps**.

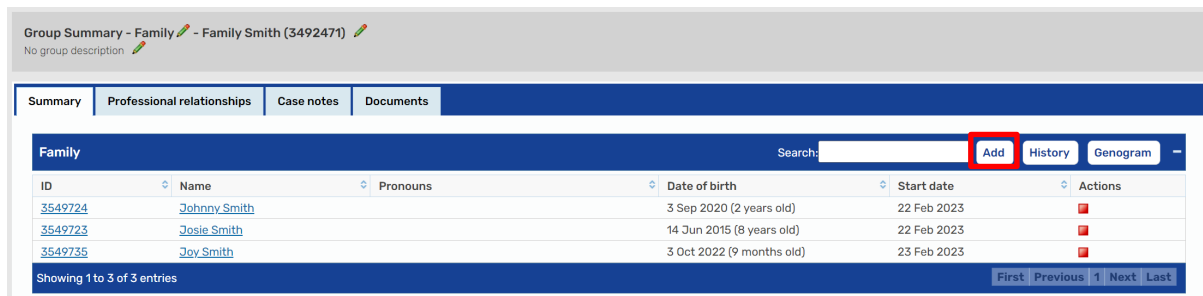
Creating a Group

Before a new Group is created it is best practice to check all the potential group members to see if any are already in a Group. If a person is already a member of a Group, this will display on the right hand side of the Person summary screen under the heading Family or Carers.



If a Group already exists, further family members can be added to the existing Group. **Do not create a second group.** Mosaic will allow you to choose which members of the Group are included in the worksteps that you wish to record into.

Clicking on the Group hyperlink will open the Group summary screen where you will be able to view the current Group members.



To add new members, click on the **Add** button. Complete a Person Search for the new Group member and select them from the search results. Once selected, the screen will refresh to display the new Group member. Repeat to add any additional new Group members as required.

If a Group does not already exist on any of the people that you are working with, a new Group can be created. To do this navigate to the **Person summary** screen of one of the subjects. From the sidebar select **Group > Create group**.

The **Create** screen will display. If the person is already a member of a Group the details of the Group membership will display.

Create

This subject is already a member of the following. Please check before creating another.

Name	Description	Type	Other members
Family Smith		Family	Johnny Smith, Josie Smith, Joy Smith

In most circumstances workers should use the existing group for families once it has been checked that this is the correct family, unless there is a specific reason not to. To use the existing Group, click on **Cancel** and follow the steps outlined above to update the Group membership.

To create a new Group, click on **Create**. This will refresh the screen to display field to be completed to name the new Group.

Create

Fields marked with a * are required

Title *

Description

Type *

Family Carers

This screen also displays when a Group does not already exist for a subject in Mosaic. Complete the fields as follows:

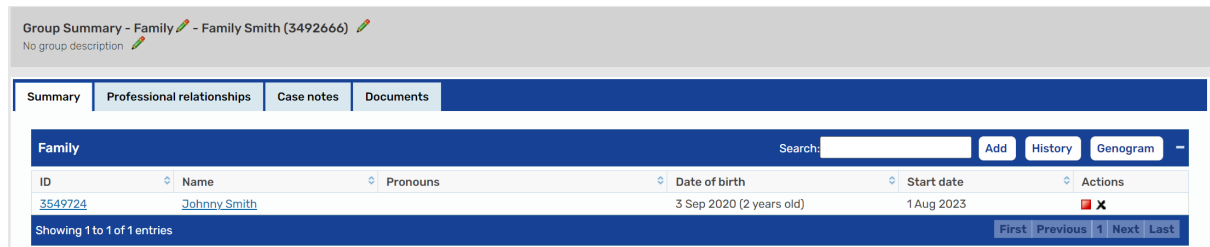
- **Title** – use the prefix **Family** and then add the surnames in descending order by age. i.e. **Family Smith/Jones/Brown** as appropriate. If the surname is a common surname, add the Postcode at the end of the name. i.e. **Family Smith LN1 1AA**. The prefix **Carer** should be used if creating a Carers Group within the Fostering and Adoption teams

Please note: Postcodes should not be added to a Family name if the address is confidential or should not be disclosed to certain people as this will print off when any grouped forms are outputted to a PDF.


- **Description** – can be used to define the group further i.e. adding a postcode
- **Type** – tick **Family** when working within Social Care or Early Help teams, tick **Carers** when working within Fostering and Adoption teams.


- Click **OK** to create the Group.

The screen will refresh to display the new Group, its only member being the person whose record was used to create the group.



Click on the **Add** button to add to family icon as outlined above to add further Group members.

If the Group name needs updating at any point it can be amended by clicking on the  edit icon.

If members need removing from the group at any point, this can be done by clicking on the  end icon. **Please Note:** This can only be done if they are not the subject in any of the worksteps showing in **Current work**.

Merging Worksteps

Merging Worksteps can only be carried out by workers that have the access rights to do so. A Merge is easier to complete if the steps outlined above regarding checking and updating Group memberships are completed first.

If at any point if you require support with the following process or believe that you have done something wrong please raise a **How Do I** request as soon as possible. A member of the Mosaic team will be able to shadow your device and guide you through the process.

If you make a mistake – everyone makes them, please let the Mosaic team know so that we can fix the error. The quicker we are alerted the easier it is to fix.

Scenario 1 – There is an open case, when the worker has visited they have identified that there are additional siblings that need to be added or a record needs to be created for an unborn.

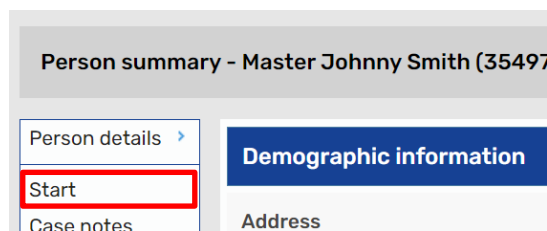
Start by updating the Group membership as outlined in the above Groups section of this guide to add any new siblings. Remember to update the **Personal relationships** as well.

All additional members, including new babies and unborns, should have the appropriate **Service Request** recorded (for example, Social Care Request or Early Help Request and Allocation). This ensures that child is included within the cohort for open cases and will show up on reports.

The new **Service Request** can be added from either the Person or the Group summary.

From the Person Summary

Navigate to the person who needs to be included in the worksteps and use the **Start** on the left hand side bar to select the correct **Service Request**.



Complete the Request as appropriate to record the new information and add the required **Next actions**.

From the Group Summary

From within the **Current work** section in the Group screen, click on the **Start work** button. A New work screen will display.

Tick only the **new Group members** that you want to add a Request step to.

New work

Show 15 entries Search:

Name	Date of birth	Select all
Johnny Smith	03/09/2020	<input type="checkbox"/>
Josie Smith	14/06/2015	<input type="checkbox"/>
Joy Smith	03/10/2022	<input checked="" type="checkbox"/>

Showing 1 to 3 of 3 entries
First
Previous
1
Next
Last

<< Previous
Next >>
Cancel



Click on **Next**. A list of worksteps that you can add will display. Select the appropriate Request workstep for your Service.

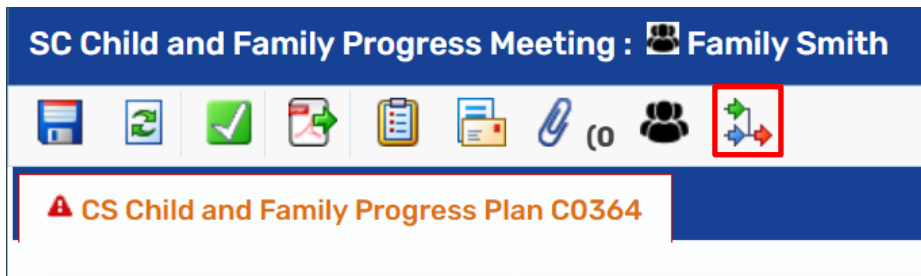
Complete the Request as appropriate to record the new information and add the required **Next actions**.

Completing the merge

Once the new member has been progressed to the point where they have all the same worksteps as the existing family members the worksteps can be merged. For example, if the existing siblings have reached the point of TAC Plan and Review or Child and Family Progress Meeting, the Assessment must be completed on the additional siblings so they all have the same steps available to merge.

Prior to starting the merge, check that all the worksteps have the word **Start** against them. Any that are in progress or have the word **Resume** against them cannot be merged until they have been Finished with the appropriate Next actions added.

Start the first workstep you wish to merge from the **Family screen** by clicking on the Incoming work  or Future work  symbol to the left of the step name. Once open the **Auto Merge** icon will appear at the top of the step.



Click on the **Auto Merge** icon.

The screen will refresh and display the step **ID** numbers listed against any additional subjects' worksteps that you are merging into this step. If more than one step is listed, please check the ID of the step that you need to merge to ensure that you select the correct one. If the step was started from the Group summary, it will display with the Group name as the Subject. If it was started from the Person summary, it will have an individual's name.

Select source steps to merge from

The following workflow is eligible to be joined to this workflow. The listed subjects of any selected workflow will be added to this step and the incoming work item will be cancelled. The previous step(s) will be linked to this one.

Family Smith workflow steps
Search:

ID	Subject	Assignee	Incoming date	Select
23765973	Family Smith	Amy Brooke	08/03/2023	<input type="checkbox"/>

Showing 1 to 1 of 1 entries

First
Previous
1
Next
Last

Tick the **Select** box for all the subjects that need to be merged into this step and click on **OK**. **Save** the workstep using the Save icon . The screen should refresh and show the additional sibling. The step is now merged and you can add information to the workstep or close out of the step.

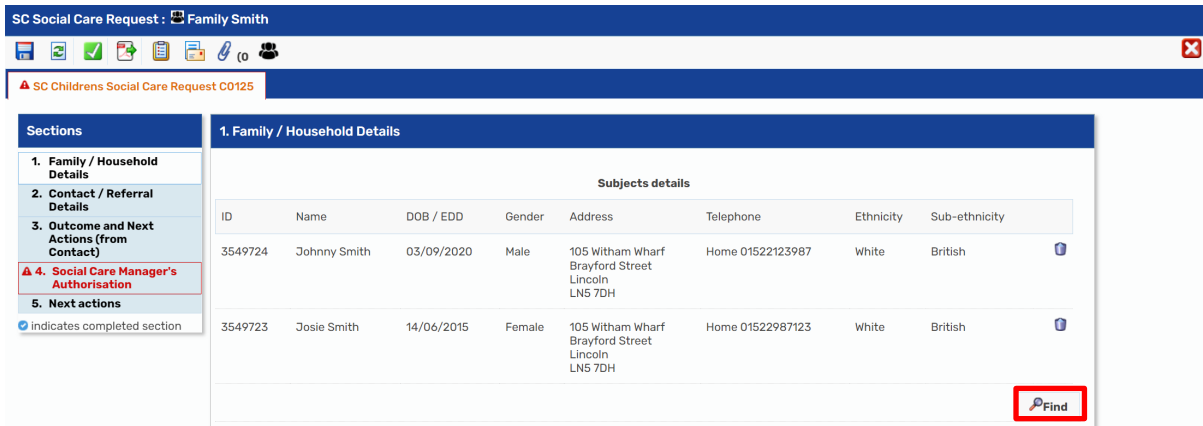
Repeat the above process to merge the remaining steps within this workflow as required.

The merged step may need reassigning to the allocated worker if the merge was performed by a manager.

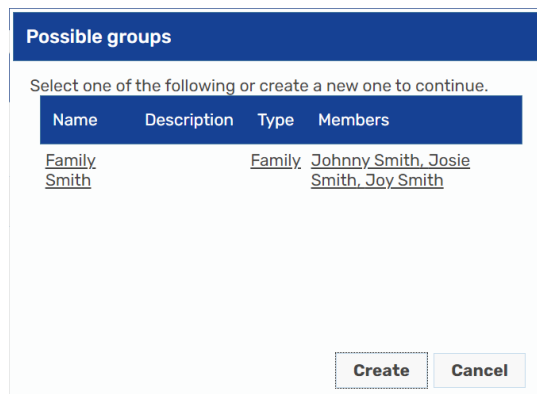
Scenario 2 – At the point of Service Request, additional siblings have been identified.

Whilst the worksteps are at the Request stage, they can be merged before adding the **Next actions** to allocate the work.

Merging steps this way will only work on Request steps that have the **Find** button for the Subjects details table and are group enabled steps. An example is below.



Click on **Find** and complete a person search for the additional sibling(s). Once completed, select the sibling(s) from within the search results. If the request was on an individual, if any of the siblings are in an existing Group, a **Possible Groups** screen will display. If the request is already on a Group, the additional sibling will be added to the group automatically when the step is saved.



Select the existing Group from the list. The screen will refresh and the second sibling will now be added to the list of subjects within the workstep. Additional subjects can be added as required.

If an existing Group does not exist, a **Create** screen will appear.

Create

Fields marked with a * are required

Title *

Description

Type *

Family Carers

Follow the steps outlined in the above section to create a new group. Once the Group has been created the screen will refresh to display the extra sibling within the subjects table. Additional subjects can be added as required.

Once the workstep is **saved**, it will now be recorded in a group containing those entered into the Subjects details section automatically. Nothing further needs to be done and all steps added as a **Next actions** can be added to those selected from the group.

Other Scenarios

If the scenario with the case you would like to be grouped does not fit into any of the options above, please use the **How Do I** on FreshService to ask for guidance. It is much easier to give advice than it is to correct workflows that are incorrectly grouped/merged.