Adults Quick Guide

Workflow

When work is started from the **Start** sidebar menu in a person's record it will create a new **workflow** when saved.

Individual items of work created in Mosaic are referred to as a **workflow step** and multiple workflow steps make up a workflow.

Within most workflow steps there is at least one main form and there are also optional forms and letters available via the **Forms and letters** toolbar icon

Before finishing any workflow step you will need to add relevant next actions. All workflow steps need at least one next action to be recorded before the step can be finished.

The next actions represent the outcomes identified in the workflow step i.e. what has happened, what needs to happen and who needs to be made responsible for completing the next workflow steps (actions).

When workflow needs to continue, next actions are assigned to an appropriate team or worker for completion. When 'sent' the next actions become new workflow steps.

Some next actions are terminating steps and require no further action (NFA) these do not therefore need to be assigned to a worker or team as they will not generate a new workflow step.

It is important to continue existing workflow wherever possible to prevent the creation of multiple workflows.

If you need to complete a piece of work that is not assigned to you, your team or a member of your team you will usually need to contact the team or worker it is assigned to and ask them to re-assign it to you or your team for completion.

Continuing existing workflow also ensures information recorded in previous workflow steps is carried forward (prepopulated) to future steps.

Viewing Workflow

The **Current work** section on the **Person summary** screen displays any new (incoming), incomplete or future work.

It shows the title of the workflow step and the name of the worker or team that the step is assigned to.

Each workflow step will have a **work** icon next to it indicating the type of work:

= Incoming work (not yet started)

= Incomplete work (started but not yet finished)

= Future work (has future scheduled start date)

Each workflow step will also have an icon to indicate the priority of the work (based on the priority recorded when it was added as a next action) and another icon to indicate whether it is group or individual workflow (Adult Care does not use group workflow).

= normal priority

= urgent priority

= low priority

= individual workflow

= group workflow

Please note: Adult Care does not use group workflow but you may see this icon if the person is linked to a child's case or they are transitioning from Children's Services to Adult Care

Clicking the **workflow step name** hyperlink allows you to view the **Workflow Step Summary** screen.

The **Workflow map** and **History** buttons on the **Current work** section can be clicked to access the **Workflow map** and **Work history** screens respectively. These screens can be used to view all (both current and historic) workflow.

The **Workflow map** is a useful tool for a visual of a person's journey. It allows you to view the person's workflow and see the progression of a case.

All workflow steps are colour coded to indicate whether work is incomplete, finished (completed), incoming or scheduled for completion in the future. The **key** icon will show what the coloured borders represent.

To view all workflow maps on the record click the **View workflows** icon - a new workflow map is created whenever work is started from the Start sidebar menu on a person's record

- The **Green dot** indicates an active/ongoing workflow.
- The **Green tick** indicates the workflow that is currently being displayed.

Click the **Summary** button to view the **Workflow Step Summary** screen for that workflow step.

Work history displays the same information as the **Workflow map** but in table format and is useful to see which worker or team workflow steps are currently or were last assigned to.

Click the **Work** hyperlink to view the **Workflow Step Summary** screen for that workflow step.

The **Documents** section in the sidebar menu can also be used to view workflow. It contains two tabs; **Forms and letters** and **Attachments**.

The **Forms and letters** tab contains all saved and finished forms and letters created in Mosaic.

Click the **Step summary** icon in the **Actions** column to view the **Workflow Step Summary** screen for that workflow step.

The **Attachments** tab contains any external documents that have been uploaded to the person's record.

For further guidance please refer to the **Workflow Map, Work History**, **Documents Section** and **Workflow Step Summary Screen** user guides.