

## Adults Quick Guide

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### Workflow Step Summary Screen

All workflow steps – Incoming work, Incomplete work, Completed work and Future work – have a **Workflow Step Summary Screen**.

#### Accessing the Workflow Step Summary Screen

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You can access the **Workflow Step Summary Screen** for any workflow steps on a record (as long as your system permissions allow) – not just those assigned to, or completed by, yourself.


The screen can be accessed from the **Workflow map**, **Work history** and **Documents** sections. Please refer to the separate user guides for more information about these sections.

- For all work (Incoming, Incomplete, Completed and Future work) from the **Workflow map** screen click the **Summary** button located under the relevant workflow step.

The **Workflow Step Summary Screen** will open in the main Mosaic window and the Workflow map screen will be minimised.

- For all work (Incoming, Incomplete, Completed and Future work) from the **Work history** screen click the relevant workflow step title in the **Work** column.

The **Workflow Step Summary Screen** will open in the main Mosaic window and Work history will no longer be visible.

- For Incomplete and Completed work only, from the **Forms and letters** tab in the **Documents** section (**Filed documents** screen) click the **Step summary** icon  for the relevant workflow step in the **Actions** column.

**Please note:** The **Filed documents** screen will not show any Incoming or Future work so you will not be able to access the **Workflow Step Summary Screen** from the **Documents** section for these types of work.

The **Workflow Step Summary Screen** will open in the main Mosaic window and the Documents section will no longer be visible.

You can also access the **Workflow Step Summary Screen** for any Incoming, Incomplete and Future work (but not Completed work) by clicking the **workflow step name** hyperlink within the **Current work** section on the **Person summary** screen.

In addition you can access the **Workflow Step Summary Screen** by clicking on the step 'title' in your **Allocations, Recently viewed** and **Current work** sections, when working in **Full** or **Narrow workview**. Or, by clicking the step 'title' in the **Current work** section within the **Team workview**.

## The Workflow Step Summary Screen

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The **Workflow Step Summary Screen** contains a lot of useful information.

The screen expands and updates as workflow steps are completed.

The **Workflow Step Summary Screen** for a completed (finished) step contains the most information.

The sections shown on this screen only appear if there is information to display. For example, Requests will only display if any requests or notifications have been sent.

The sections you may see are listed. Please refer to the [example of a workflow step summary screen](#) for further details.

1. **Status** shows whether the work is "Not Yet Started" (for Incoming and Future work), "Incomplete" or "Completed".
2. **ID** displays a unique ID number for the piece of work (this is assigned automatically by Mosaic).

This ID is needed if you are requesting a workflow step is re-opened or deleted – known as the workflow step ID

3. **Documents** displays the name of all form and letter templates opened within the workflow step.

This includes the main form(s) plus any optional forms and letter templates used during completion of the step.

The documents listed can be clicked on to open and view the document.

**4. Attachments** displays the name of any documents uploaded within the workflow step.

The documents listed can be clicked on to download, open and view the document.

**5. Previous** shows the last workflow step recorded, i.e. the one this step was recorded as a next action in.

**6. Assignment details** shows the last person the workflow step was/is currently assigned to.

Clicking [History](#) allows you to view a list of all assignment details if the work has been reassigned at all. This shows you where the work was assigned, who assigned the work, along with the date and time they did it.

**7. Progress details** shows details of the date and time the workflow step was started and finished (once it has been started and finished) plus details of the last person to update the step and when they did so.

For scheduled workflow steps e.g. reviews it will also show you the date the work was scheduled for.

For any re-opened workflow steps it will also detail when the workflow step was re-opened, by who and will show any notes added as to the reason for the step being re-opened.

**8. Requests** gives details of any requests and notifications that have been sent from the workflow step – along with who sent them and who they have been sent to.


The status of the requests and notifications is visible here e.g. whether they have been sent or completed.

The ability to acknowledge notifications is also available here, once a workflow step has been finished. See the **Acknowledging Notifications** user guide for full details.

**9. Proposed next actions** displays next actions recorded within the Actions Taken section of the form, which have not been 'Sent Immediately', and so will send when the workflow step is 'finished'.

It also displays who the action has been assigned to, any reasons recorded for an action and any notes recorded for an action.


There are also 2 icons visible:

- I. The **Yellow cog** icon  will just state 'No action available' – as the action is only 'proposed'
- II. The 2<sup>nd</sup> icon shows the priority that action was set at – normal, low or high.

**10. Next actions** displays next actions recorded within the Actions Taken section of the form, which have been 'Sent Immediately', and so were sent when the workflow step was saved.

It also displays who the action has been assigned to, any reasons recorded for an action and any notes recorded for an action.

There are also 3 icons visible:

- I. The **Yellow cog** icon  will display a list of options available for that action (workflow step). This will allow you to start/resume any work assigned to yourself, a member of your team, or your team, or access the **Workflow Step Summary Screen** for that workflow step.
- II. The **Work** icon shows you the status of the workflow step - whether it has been completed, when it is scheduled for (for future work), is due to be started, is incomplete etc.
- III. The 3<sup>rd</sup> icon shows the priority that action was set at – normal, low or high.

The **Workflow Step Summary Screen** will also have a sidebar menu on the left of the screen.

The sidebar menu will allow you to return to the **Person summary** screen and view the **Work history** section.

Depending on whether you are viewing a completed workflow step or not you may also have the options to **Start** or **Resume** the workflow step. You will only see these options if the work is not completed and it is assigned to you, a member of your team, or to your team, or you have been sent a request or notification from this workflow step.

## Example of a Workflow Step Summary Screen

Adult Review of Care and Support Plan (Revised): Peter Purple (8412)

Resume  
Person summary  
Work history

**Status** 1  
Incomplete

**ID** 2  
54644





**Previous** 3  
[Adult Review of Care and Support Plan \(Revised\)](#) for Peter Purple



**Assignment details** 4  
Assigned to: [Laura Gibson](#) | [History](#)



**Progress details** 5  
Scheduled for: 20/04/2021  
Started on: 02/09/2021 10:22  
Last updated by: [Laura Gibson](#) on 02/09/2021 10:23

**Documents** 6  
[\(Adult\) Care and Support Plan Review](#)  
[\(Adult\) Support Plan Costings](#)  
[Adult Personal Budget Letter](#)

**Attachments** 7  
[CHC checklist \(02.09.2021\)](#)

**Proposed next actions** 8  
  **Adult Review of Care and Support Plan (Revised)**  
Assigned to: Adult Care Grantham  
Reason: Adult Annual planned  
  **Adult Purchase Service Request**  
Assigned to: Laura Gibson

**Next actions** 9  
  **Adult Change in Care Package Delivery Request**  
Assigned to: Laura Gibson

**Requests** 10  
 **Adult Please review information and authorise - SENT** | [History](#)  
Assigned on 02/09/2021 10:23 to [Helen Gilmartin](#) by [Laura Gibson](#)  
**Note** increase to homecare  
 **Adult Admin output request - SENT** | [History](#)  
Assigned on 02/09/2021 10:22 to [Adult Admin Grantham](#) by [Laura Gibson](#)  
**Note** Please print and post a copy of the review and the personal budget letter and post to Peter at his home address