

Adults Quick Guide

Printing Documents

All forms and letter templates created in Mosaic can be printed by generating a PDF version of the document.

Only finished versions of these documents should be shared with the person or their representative.

Incomplete versions can be printed for use as required i.e. when you choose to 'output for written completion'.

Creating a PDF

To create a PDF, you must first navigate to the person's record (**Person summary** screen) and open the relevant form or letter.

If the form you need is the main form within a workflow step, and the workflow step has not yet been started (incoming or future work) or is incomplete (started but not yet finished), you can click on the **work** icon in **Current work** and then click **Start work** or **Resume work** (you will usually only see these options if the step is assigned to you, a member of your team or your team) to open the workflow step.

If the workflow step is finished, the quickest way to open the form is via the **Documents** section in the sidebar menu.

Incomplete work (started but not yet finished) can also be found in the **Documents** section and this is the best place to locate optional forms (both those created within and outside of workflow steps) and letter templates.

Alternatively, the following buttons in **Current work** can be used:

- **History** (opens the **Work history** section):

The **Workflow Step Summary** screen will display when the **hyperlink** within the **Work** column for the required workflow step has been clicked.

Any forms or letter templates completed within the workflow step can then be opened by clicking on the **name** hyperlink within **Documents** on this screen

- **Workflow map:**

When you click on the **Summary** button of the workflow step, the **Workflow Step Summary** screen will display in the original Mosaic window (not in the workflow map window).

Any forms or letter templates completed within the workflow step can then be opened by clicking on the **name** hyperlink within **Documents** on this screen

Printing the Document

Once you have opened the form or letter you wish to print:

- Click on the **Output current document** icon 

The **Output options** popup window displays

When printing a document, it is important to select which sections to include and what information is required.

The '**Next actions**' section should **not** be included in any documents printed for the person or their representatives.

The '**Verification information**' checkbox **should** always be selected when providing a copy of a document for the person or their representatives.

To increase or decrease font size, left click the **font size slider** and drag to set the required font size.

If a version of a workflow step is required to be written on (with prepopulated information in the appropriate fields and all empty textboxes expanded) select the checkbox for **Output for written completion (empty textareas are expanded)**.

The default **Output options** are set to print **All sections** of a form.

If the **All sections** checkbox is selected the whole form will print. You should always consider the need to amend the section inclusion.

For example, it would not be appropriate to include the 'Next actions' section on a copy of a document which is to be given to a person or their representative, so the default setting would need to be changed.

To choose specific sections of the form to print; select the **Sections** checkbox and type in the sections required into the 'Sections' field.

There are also options to print the **Current section** (the section you were viewing when clicking the 'output icon' – this will be 'pale' in the sections menu) or **Completed sections only** (the sections with a tick in the sections menu), using the relevant checkboxes.

When the required **Output options** have been selected, click the **Output to PDF** button

The PDF will either automatically open as a separate window on your screen, or appear in your downloads (depending on your computer settings).

If it opens in downloads, click **Open** to view the output.

Once the PDF displays you can choose to save, email or print it as required.

When you create a printable document from Mosaic, it automatically downloads to your computer.

To prevent retaining sensitive documents on your computer, you will regularly need to clear your download history and empty your recycling bin.

Refer to the **Clearing Downloads** user guide for full details.