# Adults Quick Guide

Current Work on Person Summary Screen

Current work is located on the **Person summary** screen of a person's record. It is visible in both **Closed** and **Narrow workviews**.

It displays all new, incomplete or scheduled (future) work for the person. So, if your system permissions allow, you will see all work on the person's record, not just the work assigned to you or your team.
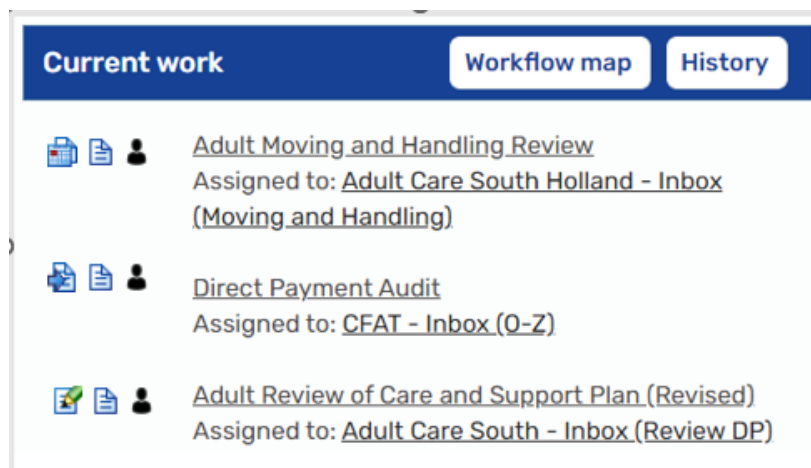
If your system permissions do not allow you to see all work on the person's record you will see a red message highlighting that some steps are restricted from your access and not shown.
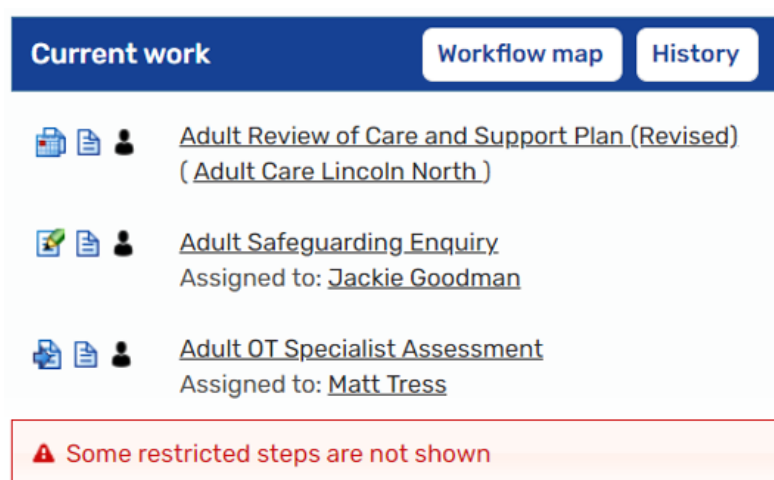
If a person has no work currently on their record, **Current work** will still appear on the **Person summary** screen, but it will state *'No current work'*
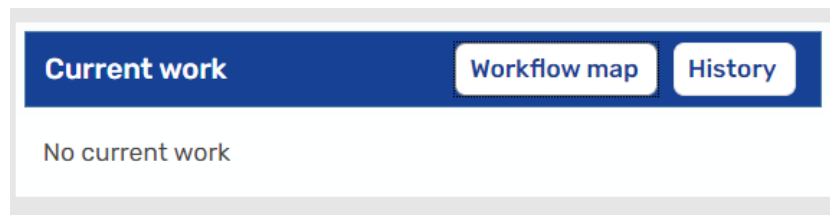
Current work contains a mixture of hyperlinks (underlined text), icons and buttons which are used to determine or display additional information about the work or who it is currently assigned to.

Hyperlinks

The name of each workflow step and the name of the worker, team inbox or team that the step is assigned to are both hyperlinks.

- Clicking the **workflow step name** hyperlink allows you to view the **Workflow Step Summary** screen for that piece of work. Please refer to the **Workflow Step Summary Screen** user guide for further guidance about this screen.

Please note: If your do not have sufficient system permissions to view a **Workflow Step Summary** screen at all, you will not be able to click on the hyperlink. Your mouse pointer will usually change to a hand and your will see a dialog box, e.g. *'View summary'*, when you hover over a hyperlink if you are able to use it.

- Clicking the **worker, team inbox** or **team name** hyperlink allows you to view the summary screen for that worker/team inbox/team

Icons

Each workflow step listed within **Current work** will have three icons displaying to the left of the workflow step name.

The first icon (from left to right) indicates the type of work, the middle icon indicates the priority of the work and the last icon indicates whether it is group or individual workflow.

Work icon - Indicating the Type of Work:

 = **Incoming work** (not yet started)

 = **Incomplete work** (started but not yet finished)

 = **Future work** (has future scheduled start date e.g. review)

Clicking the **work** icon will display a list of actions you can take.

The list of actions will vary according to your role, system permissions and the type of work you are looking at. The options will also vary depending on who the work is currently assigned to.

If there are no actions you can take for a particular piece of work you will see *'No action available'.*

For **Incoming work** or **Future work** you may see the options to *Start work* or *Assign work*.

For **Incomplete work** you may see the options to *Resume work* or *Assign work*.

- o Clicking **Start work** will allow you to start the incoming or future work. The workflow step will open the workflow step in a separate window.

Please note: If the workflow step is not assigned to you (e.g. currently assigned to your team) you will see a popup window advising you of this – click the **Yes** button to continue and the step will automatically be assigned to you the first time you click the **Save** toolbar icon within the step.

- o Clicking **Resume work** will allow you to resume (continue with) the incomplete (already started) work. The workflow step will open the workflow step in a separate window.

- o Clicking **Update assignment** will open an **Update assignment** window. From this window you can assign the workflow step to another worker, team inbox or team as appropriate. Please refer to the **Assigning Work** user guide for further information.

Please note: Incomplete work cannot be assigned to a team so you will <u>never</u> see the 'Pass to team' option for any work that has already been started.

Priority icon

= normal priority

= urgent priority

= low priority

These icons are purely to indicate priority – clicking on them does not give you any actions to take from this screen.

Please note: The priority is selected by the worker recording the next action so something 'flagged' as urgent may not necessarily be considered as urgent by the receiving team/worker. If required, the priority can be changed by the receiving team/worker from within their **Current work, Allocations** or **Recently viewed** sections in **Full workview**, if they have the relevant system permissions to do so. Please refer to the **Assigning Work** user guide for further guidance about this.

Workflow Type icon

= 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.

These icons are purely to indicate the type of workflow (individual or group) – clicking on them does not give you any actions to take.

Buttons

Current work also contains two buttons – **Workflow map** and **History.**

These buttons are present regardless of whether there is any current or historic work on the person's record.

Workflow map button

Clicking the **Workflow map** button will open the **Workflow map**.

This opens in a separate window and shows all workflow on the person's record.

It will show **Completed** (finished) **work** as well as the **Incoming, Incomplete** and **Future work** visible within **Current work**.

Please note: For a person who has never had any workflow on their record the **Workflow map** window will open but state *'No work has been recorded'.*

Clicking on the **Close** icon will close the **Workflow map** and return you to the **Person summary** screen.

Please refer to the **Workflow Map** user guide for further guidance about this screen.

History button

Clicking the **History** button will open the **Work history** section.

This opens in the main Mosaic window over **Current work** (over the **Person summary** screen).

Like the **Workflow map** it shows all workflow on the person's record.

It will show **Completed** (finished) **work** as well as the **Incoming, Incomplete** and **Future work** visible within **Current work**.

Please note: For a person who has never had any workflow on their record the **Work history** section will open but state *'No records to display'.*

Clicking the **History** button again will close the **Work history** screen and return you to the **Person summary** screen.

Please refer to the **Work History** user guide for further guidance about this screen.