

Adults Quick Guide

Searching for Teams and Organisations – Hints and Tips

This guide is intended to provide some hints and tips around searching for and finding teams and organisations in Mosaic.

Where to Searching for an Organisation or Team

There are four main areas in Mosaic in which you can search for an organisation or team.

Which one to use will depend on your purpose.

Refer to the **Searching for a Person, Worker or Organisation** user guide for further details

1. An organisation can be search for by clicking **Organisations > Find organisation** in the header menu when in **Closed** or **Narrow workview**

Clicking on the **name** hyperlink within the search results will display the **Organisation summary**.

This screen contains information about that organisation such as address and phone numbers.

2. An organisation or team can be searched for and added within a workflow step form by clicking the **Find** button and performing a search on the **Find organisation** tab in the **Find party** window.

Clicking on the **name** hyperlink within the search results will pull through the details of the organisation or team into the workflow step.

3. An organisation or team can be searched for and added as an **Organisational relationship** by clicking **Person details > Organisational relationships** in the sidebar menu and then clicking the **Add** and **Find** buttons

Clicking on the **name** hyperlink within the search results will pull through the details of the organisation or team into **Add organisation relationship** screen.

You will then need to select a relevant '**Relationship Type**' from the dropdown menu and click the **Save** button.

Refer to the **Organisational Relationships** user guide for further details.

4. A team can also be searched for to assign a workflow step, request or notification to by clicking the **Pass to Team > Find** button both within a workflow step and from within Current work, Allocations and Recently viewed folders and the Current work section within a person's record.

Clicking on the **name** hyperlink within the search results will select the team.

Refer to the **Assigning Work** user guides for further details

Mosaic has been deliberately configured in order to help you assign work to the correct team. Therefore, when assigning work to a team from within a workflow step, where possible, use the '**Pass to Team**' dropdown menu to select the relevant team.

Refer to the relevant user guides relating to the specific workflow step or team process for further guidance.

Use Keywords and the 'Wildcard' %

Even if you know the full name of the team or organisation, it's best to search using a **keyword** or **keywords** and **wildcards (%)**

A couple of examples:

1. To find the team **Adult OT East**

Use **East** as the keyword.

Typing just **%East** in the **Name** field will find this team, along with some others that contain the word 'east'

2. To find the team **Learning Disabilities Spalding & Sleaford**

Use **Learning** as the keyword.

Typing just **%Learning** in the **Name** field will find this team, along with some others that contain the word 'learning'

Be Careful of Spaces

When typing details into the search fields, do not leave out necessary spaces between characters (letters, words, symbols), but, at the same time, do not add additional spaces.

For example:

- Typing '**adult care**' (*extra space between adult and care*) into the **Name** field will give me the message '**No records found**'
- Typing '**adult care**' (*just the one space between adult and care*) into the **Name** field will provide me with a list of lots of teams prefixed with Adult Care

Use the Postcode or Address Details

If unsuccessful in searching using the Name field we would recommend you try the Post code or any other address details before deciding that an organisation does not exist in Mosaic.

For example:

- Typing 'NG31 6NZ' in the **Post code** field will display a list of teams and organisations based at the Grantham Area Office / Grange House in Grantham
- Typing 'Orchard Street' in the **Street** field will display a list of teams and organisations based at and address on Orchard Street (mainly those in Orchard House in Lincoln)

General Rule – Team Names

For LCC Area Team the team name starts with **Adult Care** and ends with the **Town/City**

Some examples:

- Adult Care Boston
- Adult Care Louth
- Adult Care Stamford

For LCC OT Teams the team name starts with **Adult OT** followed by the **District / Area**

OT Teams:

- Adult OT North & South Kesteven
- Adult OT West Lindsey & Lincoln
- Adult OT East

For the Community Hospital and Transfer of Care Teams the team name starts with **Adult Care**, followed by the **Area** (East or West) and ends with **Community Hospital and Transfer of Care** e.g. Adult Care West Community Hospital and Transfer of Care

For the Acute Hospital Teams the team name is **Area** (East/South/West), **Town/City** and ends with the word **Hospital**

It is important that an **Organisational relationship** for the relevant **acute hospital team** is recorded when a hospital notification is received.

Please take extra care **not** to add the hospital name itself, as this will cause reporting issues.

Acute Hospital Teams:

- East Boston Pilgrim Hospital
- South Grantham District Hospital
- South Peterborough Hospital
- West Lincoln Hospital

For Learning Disability Teams the team name starts with **Learning Disability** and ends with the **Town(s)/City**

Some examples:

- Learning Disabilities Grantham, Bourne & Stamford
- Learning Disabilities Louth

For LPFT Teams the team name starts with **Adult LPFT**

Some examples:

- Adult LPFT Mental Health Social Care South
- Adult LPFT Mental Health Social Care North

For LCC Business Support (Admin) Teams the team name starts with **Adult Admin** and ends with the **Town/City** or **Hospital**

Some examples:

- Adult Admin Gainsborough
- Adult Admin Lincoln Central
- Adult Admin Skegness
- Adult Admin East Boston Pilgrim Hospital

Cannot Find the Team / Organisation or Details are Incorrect

If the organisation you are searching for is not listed when you perform a search, or the team or organisation details are incorrect, you can arrange for them to be added/updated by the Mosaic Service Desk by completing the **Create/Change Organisation** Mosaic requests form.

Suppliers / Providers

The organisation names for all LCC's contracted suppliers (service providers) are suffixed to reflect the relevant contract type:

Contract Type	Suffix
Residential and Nursing	RC; NC; or RC and NC
Community Supported Living	CSL
Home Care	HC
Day Care	DC

When searching for an organisation to add them as a **supplier / provider** to workflow steps, please ensure you select the supplier name listed with the suffix e.g. **Tanglewood Care Home (Horncastle) RC and NC**.

It can sometimes be difficult to find **supplier/provider** organisations within the purchasing workflow steps, e.g. to add an out of county care home within the **Purchase Service Request** for temporary admissions or permanent residency. This is often because the provider name has been created differently to how you would expect.

We therefore recommend that you try searching using the **postcode** or any other address details before deciding that an organisation does not exist in Mosaic.

If you still cannot find them you should email the Commercial Team - CommercialTeamPeopleServices@lincolnshire.gov.uk. The Commercial Team arrange for all new suppliers/providers to be set up on Mosaic once a signed contract has been received.

GP information in Workflow Steps

GP information is mandatory in many workflow steps. It cannot be directly recorded within a form; instead it pulls through from the information recorded on the person's record.

If a GP surgery is already recorded, it will pull through into the form.

If both a named GP and GP surgery are recorded the named GP will pull through into the form.

If neither a named GP nor GP surgery are record you will see the following message:

 **ERROR: A named GP or GP Surgery should be recorded in the 'Person Summary' screen**

You will need to then either add the named GP and GP surgery to the record or use one of the following values as the GP surgery:

- **Not currently registered with a GP Practice** = If a person is not registered with a GP surgery
- **GP Practice not known** = If the person's GP surgery has not yet been obtained

To do this:

- Click the **Show subject summary** icon  to minimise the workflow step window
- Follow the process as described above to add the named GP and / or GP surgery
- Maximise the workflow step window and click the **Refresh current form** icon  to pull the information into the workflow step

If the value of **GP Practice not known** is added, or was already recorded on the record you will see the following message:



⚠ GP Surgery is currently recorded as 'GP Practice not known'. Please update record if information is now known, otherwise tick box below.

Please confirm that the person is still not currently registered with a GP Practice, or that the name of the Practice continues to be unknown

You will have to either update the record if the information is now known or tick the checkbox to confirm the information is still unknown.

If the value of **Not currently registered with a GP Practice** is added, or was already recorded on the record you will see the following message:

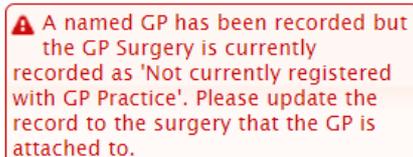


⚠ GP Surgery is currently recorded as 'Not currently registered with GP Practice'. Please update record if information is now known, otherwise tick box below.

Please confirm that the person is still not currently registered with a GP Practice, or that the name of the Practice continues to be unknown

You will have to either update the record if the person is now registered or tick the checkbox to confirm the information is still correct.

If the named GP and GP surgery information do not match e.g. GP is listed at one surgery and a different surgery or one of these 'not known / not registered' values are recorded you will see an appropriate message such as the following:



⚠ A named GP has been recorded but the GP Surgery is currently recorded as 'Not currently registered with GP Practice'. Please update the record to the surgery that the GP is attached to.

This is likely to be a common occurrence for those surgeries with a main surgery and one or more branch surgeries. If a person is registered with a branch surgery, but their named GP is showing as based at the main surgery, there will be a mismatch and the workflow step will display an error message.

To resolve this issue you will need to complete the **Create / Change Professional Mosaic** requests form to request the GP's details are updated to show them as based at the relevant branch surgery.

You will have to update the record to remove (end) the incorrect named GP or GP surgery information and then add the correct details where needed.

Remember when ending an old/incorrect named GP or GP surgery to add new/correct details, you must use yesterday's date as the 'To' (end) date to ensure the correct details pull through into any workflow steps. Refer to the **GP Details** user guide for full details.