**Adults Quick Guide**

# Searching for Virtual Workers – Hints and Tips

This guide is intended to provide some hints and tips around searching for and finding virtual workers (also known as team inboxes) in Mosaic.

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**Important Notes:**

- You should only ever be assigning work to a virtual worker if necessary – please refer to the relevant user guides re specific workflow steps and processes for more details about who to assign next actions, notifications and requests to.

- You will usually only assign work to your own team's virtual workers, as per your team's practices and procedures.

- For most processes where you need to assign work to another team's virtual worker, that virtual worker will appear in a 'Pass to Worker' dropdown menu for the next action, notification or request.

- You must never send a virtual worker any case note alerts, as these cannot be 'acknowledged'.

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## Confirm the Virtual Worker Name

If you are unsure of the virtual worker's name, you can complete an **Organisation search** for the team the virtual worker belongs to:

- Click **Organisations > Find Organisation** (main menu across the top of the screen in **Narrow or Closed Workview**) and select the team.

The **Organisation Summary** page for that team will list all team members including virtual workers within the **Workers** section.

- You can click on the **virtual worker name** to view the **Worker Summary** page and get the **Worker ID** – which can then be used in some worker search screens, though not many

- You can also see the **exact name** of the virtual worker – this can then be used when searching for the them

## Use the 'Wildcard' %

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

A couple of examples:

1. To find the virtual worker **Case Monitoring Grantham – Inbox (Unassigned)**

Use **Monitoring** as the keyword.

Typing just **%Monitoring** in the **First name** field will find this virtual worker, along with some others that contain the word 'monitoring'

2. To find the virtual worker **Adult OT WL & Lincoln – Inbox (Moving and Handling)**

Use **Moving** as the keyword.

Typing just **%Moving** in the **Last name** field will find this virtual worker

## 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 **'-  inbox'** *(extra spaces between – and inbox)* into the **Last name** field will give me the message **'No records found'**

Typing **'- inbox'** *(just the one space between – and inbox)* into the **Last name** field will provide me with a list of most virtual workers

## Try both the First name and Last name fields

Try both the **Last name** and **First name** fields, but only use one at once unless you are 100% sure of how the virtual worker name is recorded in the system

For example:

**%admin** in the **Last name** field will display the various Brokerage virtual workers

**%admin** in the **First name** field will display the Adult Admin (Business Support) virtual workers and a Safeguarding Admin virtual worker

## General Rule – First name and Last name

As a general rule for most virtual workers the beginning section of the name (**before the –**) is recorded as the **first name** and the end section of the name (**including and after the –**) is recorded as the **last name**

Some examples:

1. For **Adult Carers Service – Inbox**

First name = Adult Carers Service

Last name = – Inbox

2. For **Adult Care Spalding – Inbox (Lincs Conversation)**

First name = Adult Care Spalding

Last name = – Inbox (Lincs Conversation)

3. For **Adult OT NK & SK – Inbox (DFG)**

First name = Adult OT NK & SK

Last name = – Inbox (DFG)

# General Rule – Begin and End With

As a general rule the following applies:

- LCC Business Support Team virtual workers begin with **Adult Admin**

- LCC Area Team virtual workers begin with **Adult Care**

- LCC OT Team virtual workers begin with **Adult OT**

- Most LCC acute Hospital Team virtual workers begin with **Case Monitoring**

- LD Team virtual workers begin with **LD**

- Brokerage Team virtual workers begin with **Brokerage**

- Most Safeguarding Team virtual workers begin with **Safeguarding**, although a couple begin with **Adult Safeguarding**

- Wellbeing Team virtual workers begin with **WB**

- Reablement Team virtual workers begin with **Adult Reablement**

- All Quality Assurance Group virtual workers end with **– Quality Assurance Group**

- Most, but not all virtual workers contain **– Inbox** (sometimes with additional words after '– Inbox')

> **Remember**, for most processes where you need to assign work to a virtual worker, that virtual worker will appear in a 'Pass to Worker' dropdown menu for the next action, notification or request, so you will not need to search for the virtual worker