

Adults Quick Guide

Wellbeing Service – Senior Officers

The Senior Officer will screen and allocate cases (assign work and record worker relationships) to Trusted Assessors, Generic Support Officers and Wellbeing Service Hub Team workers as required.

The Senior Officer will also sign off work during the Wellbeing process (completing requests).

Screening and Allocating Cases from Team Workview


The **WB Initial Risk Assessment and Triage** step will be sent (assigned) to the Wellbeing Service Hub Team for all external referrals – you (the Senior Officer of the Hub Team) will screen the case and allocate (assign) the workflow step to a Hub Team worker.


The **WB Trusted Assessment and Support Planning** step will be sent (assigned) to the Wellbeing Service North or Wellbeing Service South Team as appropriate - this will be screened by you (the Senior Officer of the North/South Team) and allocated (assigned) to a Trusted Assessor.

The **WB Case Monitoring** step will either be 'Incoming Work' in the Wellbeing Service Hub Team if not yet started, or 'Incomplete Work' for the WB Case Monitoring North/ South – Inbox (Unassigned).

If the Hub Team worker has started the **WB Case Monitoring** step it may need to be re-assigned to the Trusted Assessor by you (the Senior Officer of the North/South Team), or it can be left in the WB Case Monitoring North/ South – Inbox (Unassigned) if preferred.

To screen a case:

- From **Full** or **Narrow workview**, access the **Team Workview** by clicking the **Show team workview** icon 

Please note: When you are in **Team workview**, the icon will change to the **Show individual workview** icon 

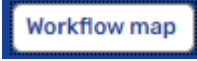

The Team workview for the **Wellbeing Service Management Team** will display

- In the **Team summary** click the relevant team **hyperlink** (Wellbeing Service Hub/Wellbeing Service North/Wellbeing Service South Team)

The Team workview for the selected team will display

- Open the **Current work** section
- Open/look at the **Incoming work** folder
- Click the **person's name** to access their record (**Person summary** screen)

Please Note: Mosaic will change the display to **Narrow workview** if you were previously in Full workview – you may wish to change to **Closed workview** if you want a full screen view of the record.

- Use the **Documents** section in the sidebar menu to review the previous Wellbeing workflow steps
- You can also use the **Workflow map**  and **Work history**  sections (accessed via the buttons located on Current work) to view work previously completed on the person's record

See relevant user guides for full details on these screens.

To allocate the case – record the worker relationship:

Once you have decided who to allocate the case to, if allocating to a **Trusted Assessor**, you will need to record a **'Worker relationship'** of **'Involved Worker'**.

This is not necessary if allocating the WB Initial Risk Assessment and Triage step to a Wellbeing Service Hub Team worker.

While still in the person's record;

- Click **Person details > Worker relationships** in the extended sidebar menu
- Click the **Add** button
- Worker = click the **Find** button
- Search for the Trusted Assessor and click name hyperlink to select – this will pull through to the 'Worker' field
- Relationship type = select **Involved Worker**
- From date = defaults in but can be amended if necessary
- Click the **Save** button then the **OK** button to return to the Person summary screen – the Trusted Assessor will display in **Professional and organisational relationships**

Refer to the **Worker Relationships** user guide for full details on how to do this.

To allocate the case – assign the workflow step(s):

Once the worker relationship has been recorded (where needed) you will need to assign (allocate) the workflow steps to the Hub Team worker/Trusted Assessor.

You have two different ways in which you can allocate the work – you can do it individually or in bulk (multiple steps at once).

Assigning Work Individually:

There are **two** ways you can assign individual workflow steps to a worker –

1. By returning to the **Team workview** (use **Full workview**) and accessing the Current work section of the relevant team
2. From within **Current work** on the **Person summary** screen

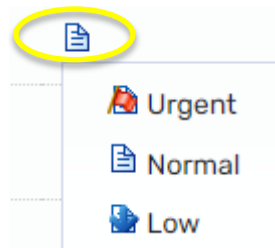
Assigning from Current work section in Full workview

- In **Full workview** access the **Current work** section

If required, you can change the **Priority** of the work when assigning.





To change the priority –

- Left click on the **Priority** icon - a mini menu will display



- Click on the icon to select the new priority required

To assign an individual piece of work:

- hover the cursor over **Incoming work** icon  or **Incomplete work** icon  until it changes to a **yellow cog** 
- left click the **yellow cog**  to see a list of actions you can take
- Click **Update assignment**



An **Update assignment** window opens.

- Pass to worker = click the **Find** button and search for the worker you are allocating to – click the name hyperlink to select the worker
- Add a note if needed
- Click the **OK** button

The '**Update assignment**' window will close and the work will move (be assigned) to the Incoming work folder of the named worker

Assigning from Current work on the Person summary screen

You will not be able to change the **Priority** of the work when assigning from here.

- left click on the Incoming work icon  or **Incomplete work** icon  next to the work you want to assign to see a list of actions you can take
- Click **Update assignment**

An **Update assignment** window opens.

- Pass to worker = click the **Find** button and search for the worker you are allocating to – click the name hyperlink to select the worker
- Add a note if needed
- Click the **OK** button

The 'Update assignment' popup window will close and the work will move (be assigned) to the Incoming work folder of the named worker

To bulk assign (assign multiple steps at once):

- In **Full workview** access the **Current work** section
- Click the **Bulk Assign** button on the **Current work** header (this is only visible when in Full workview)

A 'Bulk action' popup window will display


- You can use the 'search' box to find the work you are trying to allocate (enter the person's name in the search field to find all work for that person)
- Select the items of work you wish to allocate (tick the checkboxes)
- Scroll down and use the **Find** button by 'Pass to worker' to search for the worker you are allocating to – click the name hyperlink to select the worker


- Click the **Preview assign** button
- Add a note if needed – this will appear against all of the workflow steps you are assigning
- Click the **Assign** button then click the **Cancel** button to close the 'Bulk action' popup window - the work will move (be assigned) to the Incoming work folder of the named worker

Reassigning Work From One Worker to Another

If work has already been started (i.e. the WB Case Monitoring step) it will be in the 'Incomplete work' folder of the worker who started it (i.e. the Wellbeing Service Hub Team worker) or the relevant team inbox (e.g. WB Case Monitoring North / South – Inbox (Unassigned)) rather than the 'Incoming work' folder of the Team.

To reassign this work you will need to access the inbox/worker's Current work rather than the Team's – you will do this through the Team workview screen

- From **Full** or **Narrow workview**, access the **Team Workview** by clicking the **Show team workview** icon 

Please note: When you are in **Team workview**, the icon will change to the **Show individual workview** icon 



The Team workview for the **Wellbeing Service Management Team** will display

- In the **Team summary** click the relevant team **hyperlink** (Wellbeing Service Hub/Wellbeing Service North/Wellbeing Service South Team) for the team the inbox/worker is a member of

The Team workview for the selected team will display

- In the **Team summary** click the relevant worker name **hyperlink** of the inbox/worker you are reassigning the work **from**

The Current work for the inbox/worker will display

- From the **Incomplete work** folder, click the **Incomplete work** icon  (this turns to a **yellow cog**  when hovered over) beside the work you want to reassign

A mini menu will display


- Click **Update assignment**

An 'Update assignment' popup window will display

- Pass to worker = click **Find** button and search for the worker you are reassigning to – click the name hyperlink to select the worker
- Add a note if needed
- Click the **OK** button

The 'Update assignment' popup window will close and the work will move (be reassigned) to the Incomplete work folder of the named worker

Or you can reassign directly from the Current work section on the person's record (Person summary screen):

- left click on the **Incomplete work** icon  next to the work you want to assign to see a list of actions you can take
- Click **Update assignment**

An 'Update assignment' window opens.


- Pass to worker = click the **Find** button and search for the worker you are allocating to – click the name hyperlink to select the worker
- Add a note if needed
- Click the **OK** button


The 'Update assignment' popup window will close and the work will move (be assigned) to the Incomplete work folder of the named worker

Signing off Work

The mandatory request **WB Transfer to Senior Officer to review information and add additional next actions** will be sent by the Trusted Assessor (from the WB Trusted Assessment and Support Planning step) and the Generic Support Officer (from the WB Support Action Plan Delivery step).

This request will be sent to the Wellbeing Service Management Team and will appear in the **Incoming requests** folder.

- From **Full** or **Narrow workview**, access the **Team Workview** by clicking the **Show team workview** icon 

Please note: When you are in **Team workview**, the icon will change to the **Show individual workview** icon 

The Team workview for the **Wellbeing Service Management Team** will display

- Open the Current work section
- Open/look at the **Incoming requests** folder
- Click the **request text** in the title column – the first part of the text is the request name and the second part is the name of the step it was sent from

The **Workflow Step Summary** screen will open for the **WB Trusted Assessment and Support Planning/WB Support Action Plan Delivery** step – this screen can be used for a quick overview

- Click **Resume** in the sidebar menu – the workflow step will open in a separate window

You should review the step using the sections menu – clicking into each section to check the details recorded.

The **Next actions** section is always the last section of a form and is where next actions are recorded. At least one next action must be recorded before a workflow step can be finished. Next actions are how we show what will happen next and who will do it.

The Trusted Assessor/Generic Support Officer will be prompted to add certain actions based on the answers to the questions within the form.

It will be your responsibility to check these actions and add any others that are relevant.

In the WB Trusted Assessment and Support Planning step, if the case is progressing to a Generic Support Officer, you will need to add the action **WB Transfer to Support Officer for Service Delivery** and assign it to the relevant Generic Support Officer using the 'Find' button against 'Pass to worker'.

It will appear as **WB Support Action Plan Delivery** in Current work.

To record next actions:


- Click the **Add** button
- Select the appropriate action and assign as applicable
- Add a note if you are assigning it to another worker or team
- Amend the priority if necessary

If recording multiple actions click the **Add** button – this will add the action and refresh the screen so you can record the next one.

If recording just one action, or once all actions have been selected, click the **Add and close** button – this will close the popup window and display the actions added.


Once you have reviewed the form and/or checked/recorded necessary next actions you will need to complete the request, or return if to ask for more information.

Completing/Returning a Request

- Click on the **Request** toolbar icon  - this will be highlighted red denoting that there is a request to complete.

The outstanding request(s) will display in red text.



- Click on the **red text box** to open the outstanding request
- Select **Completed** radio button if accepting or **Returned** radio button if rejecting


A note should be added if rejecting to explain why and the workflow step should be exited rather than finished using the **Close** icon .

This will send the case back to the worker who completed the step.

- Click the **OK** button

The workflow step screen displays.

- Click the **Save** icon 
- Clicking the **Finish** icon  will finish (lock down) the workflow step.

Workflow steps cannot be finished if there are any incomplete mandatory fields or if there are any requests which need completing. Once the **Finish** icon  can be clicked no further input can be made and the next action(s) will send, appearing as new 'incoming work' to be completed.

Allocating to a Generic Support Officer

If the case is progressing to the **WB Support Action Plan Delivery** step, once you have added the action, completed the request and finished the **WB Trusted Assessment and Support Planning** step you will need to record the 'Worker relationship' of 'Involved Worker' for the Generic Support Officer.

See the [To allocate the case – record worker relationship](#) section for further details.

You may also wish to reassign the **WB Case Monitoring** step to the Generic Support Officer from the Trusted Assessor/ WB Case Monitoring North/ South – Inbox (Unassigned). This is not necessary as the Generic Support Officer will have the option to 'resume' this step from the Current work on the Person summary screen but it may be useful for the Generic Support Officer to see this in their workload.

See the [Reassigning Work From One Worker to Another](#) section for further details.