

Acting For Others & Your Dual Role

The act for function in Mosaic allows you to access the individual workview of other workers (including team inboxes and your dual roles).

It is only available in the **Narrow** and **Full workview** and is accessed via the **Show workers available to act for** icon 

Whilst acting for another worker, you can undertake the workflow steps that have been assigned to them and also reassign tasks to other workers if appropriate.

When acting for others you gain the permissions of the worker you are acting for and lose your own i.e. if the worker you are acting for can access a restricted record you will also be able to do so while acting for them. However, if you have access to a restricted record but the worker you are acting for does not, you will not have access to the record while acting for them.

This functionality is primarily set up for managers but can also be set up for other workers as required and can be set up permanently or temporarily as needed.

The act for function can be utilised to cover and monitor workloads of someone who is away from the office such as on leave, training or sick.

This functionality prevents the need for workloads to be reassigned in order to monitor them and minimises the risk of having to wait for a worker to return in order to action urgent tasks.


Please exercise caution when swapping between profiles as this can result in erroneous recording.

To act for another worker or inbox:

- Click the **Show workers available to act for** icon 

A list of available workers, including any team inboxes, will display. (Your name will always be at the top of the list and all other names are alphabetical by surname)

- Click on a worker or inbox name within the list will to display the individual workview for that worker or inbox.

The name at the top of the screen will change to the worker/inbox selected and the **Show workers available to act for** icon will change 

In **Full** or **Narrow workview**, you will have access to the **Allocations** and **Current work** section for the worker/inbox you are acting for.

Please note: The **Recently viewed** section will display your own recently viewed cases. This will not change when acting for another worker or inbox.

You will also be able to access the **Homepage** for the worker/inbox in **Narrow** or **Closed workview**.

Workflow steps and information can be viewed, allocated and completed in the normal way.

Mosaic recognises and records when a worker completes work whilst acting for another worker in order to ensure an accurate audit trail is captured.

To return to your own individual workview:

- Click the **Show workers available to act for** icon 

The list of available workers, including any team inboxes, will display.

- Select your name from the list. (Your name will always be at the top of the list and all other names are listed alphabetically by surname)

The name at the top of the screen will change back to your name and the **Show workers available to act for** icon will change back to normal 