

Adults Quick Guide

Using the Homepage

The **Homepage** displays in **Narrow** and **Closed workviews** when you first sign into Mosaic, and have not yet accessed a worker/team/person's record.

It can also be accessed at other times by clicking **Home** in the header menu across the top of the screen.

The **Homepage** displays the header menu, and sections containing information about Recent work, Unfinished case notes, Alerts (from case notes), Mosaic version information and a Welcome panel.

The icons to change which workview you are viewing and the option to Sign out of Mosaic are also always visible in the header menu when you are viewing your **Homepage**.

Main Header Menu

There are up to 8 dropdown menus available in the main header menu across the top of the **Homepage**.

The menus and menu options you see will depend on your role and system permissions, or if you are acting for another worker their role and system permissions.

This guide will only cover the most relevant options for Adult Care

1. People

The **People** menu has options for working with people (your customer/client, their relatives, neighbours etc) recorded on Mosaic.

- **Find person** – Opens the **Person search** window

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

- **Last find** – Only displays if you have completed a person search in the session (since logging in) and will display the results of the last search.
- **Print caseload** – Opens a separate window with the details of your allocations (cases you have an open worker relationship for) in addition to cases that you have been assigned workflow steps for. Clicking the **Print** button allows you to print this list.

Refer to the **Your Caseload Report** user guide for further details.

2. Organisation

The **Organisations** menu allows you to search for an organisation.

Organisations are internal LCC teams and other external professional organisations e.g. LPFT, GP surgeries, hospitals and schools.

Performing a search will allow you to access the contact details for the organisation along with a list of members of that organisation.

If you have searched for an organisation and it is not listed in the search results, please contact the Mosaic Service Desk to request the organisation is added to Mosaic.

LCC staff should do this using the **Create/Change Organisation** form in Our Intranet > Mosaic Requests. Non LCC staff should call the Mosaic Service Desk.

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

3. Workers

The **Workers** menu allows you to search for a worker.

Workers are Mosaic users and other professionals e.g. GPs and teachers.

Performing a search will allow you to access the contact details for the worker.

If you have searched for a worker and they are not listed in the search results, please contact the Mosaic Service Desk to request that the worker is added to Mosaic.

LCC staff should do this using the **Create/Change Professional** form in Our Intranet > Mosaic Requests. Non LCC staff should call the Mosaic Service Desk.

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

4. Contracts

The options in the **Contracts** menu are available for use by Adult Care Contracting Team.

5. Finance

The options in the **Finance** menu are available for workers within LCC Finance and Serco Finance teams.

6. Reports

The **Reports** menu is not currently being used. Reports for Mosaic are run by Business Support and managers using an external program.

7. Tools

The majority of the **Tools** menu options are only available to the Mosaic Service Desk. The only option you may need to use is **Personal settings**.

Personal settings allows you to set your Chronology formatting settings – please use this option if you are running a chronology for a meeting, court report etc.

Refer to the **Chronologies** user guide for details on how to apply LCC's agreed standard settings.

8. Help

The **Help** menu has options to access the Mosaic Hub, and external links to websites relevant to Adult Care activity.

Use the **Procedural help** option to gain access to the Mosaic Hub – this will open in a separate window and you can then navigate to the **Adults** section.

Sections



The main part of the **Homepage** consists of a number of sections.

The first is **Homepage**, which provides information about the last time last time you logged into Mosaic and your worker name.

It also allows you to see who you are working as, which is useful if you are working on behalf of a colleague.

The second is **Lincolnshire County Council Information** which shows information about which environment of Mosaic you are using, for example LIVE or TRAIN.

To minimise (close) or maximise (open) any individual section click on the icon in the top right hand corner of each section:

- Click  to minimise (close) the section
- Click  to maximise (open) the section

Alerts

The **Alerts** section contains a list of alerts. These are sent from a **case note** to advise you that the note has been recorded on a person's record.


Your alerts will remain in this section until you 'acknowledge' them.

Clicking the **Subject's name** hyperlink will open the **Person summary** screen.

Clicking on the **alert** hyperlink (in the **Title** column) will open an **Alert** window. From here the **case note** can be opened and read using the **View case note** button.

The alert can be removed from your alerts list using the **Acknowledge** button, or you can close the **Alert** window without removing your alert by clicking the **OK** button.


Refer to the **Acknowledging a Case Note Alert** user guide for further information

It is possible to view further information about the **case notes** you have received alerts about by clicking the **triangle** icon  in the top right hand corner of the **Alerts** section.

This icon maximises the **Alerts** section so it is the only one visible and will display details of the **case notes** in the **Message** column, to include who sent the alert, when it was sent, the type of **case note** recorded and the recipients.

To return to the original **Homepage** options, click the icon  in the top right corner of the section.

If more alerts have been sent than can be displayed the options of **First**, **Previous**, **1,2,3...Next** and **Last** will become active in the button right corner. These options allow you to navigate through the lists of alerts.

At the top of each column is a double arrow icon . This will filter the results for criteria of the column e.g. the **Subject** name column will be changed to alphabetical or reverse alphabetical order. By default all tables will display the last (most recent) piece of work at the top.

Recent work

Recent work displays a list of up to the last 5 workflow steps you have been working on.

The first column shows the **Status** of the workflow steps using the following icons:


 Completed work

 Incomplete work

Clicking the title within the **Item of work** column will open the **Workflow Step Summary** screen for that workflow step.

Incomplete work can then be resumed by selecting the relevant option from the sidebar menu.

Clicking the **Subject** name will open the **Person summary** screen for that person.

At the top of each column is a double arrow icon . This will filter the results for criteria of the column e.g. the **Subject** name column will be changed to alphabetical or reverse alphabetical order. By default all tables will display the last (most recent) piece of work at the top.

Unfinished case notes

The **Unfinished case notes** section displays any **case notes** that have been saved for further completion. This means that the **Save and close** button was used at the end of recording the case note rather than the **Finish** button.

The **Status** column will show if the **case note** can be edited or has been timed out as indicated by the following icons:



Unfinished case note - can be edited.



Case note has been timed out – only appending is possible.


Case notes time out if you do not 'finish' them within 24 hours of first clicking 'save'. Timed out **case notes** cannot be edited but must be finished. Any alert recipients added to a **case note** will not receive the alert until the **case note** is finished.

Clicking the **Title** of a **case note** will open the **Amend** (for editing) or **Append** (for timed out) **case note** screen. For editable notes you can update the notes field before finishing. For timed out notes you cannot amend the original text but have a secondary notes field where you can add additional text if required and then click finish.

Refer to the **Finishing Timed Out Case Notes** user guide for further information.

Clicking on the **Subject** name will open the **Person summary** screen for that person.

If you have more unfinished case notes than can be displayed the options of **First, Previous, 1,2,3...Next and Last** will become active in the bottom right corner of the section. These options allow you to navigate through the lists of unfinished case notes.

At the top of each column is a double arrow icon . This will filter the results for criteria of the column e.g. the **Subject** column will be changed to alphabetical or reverse alphabetical order. By default all tables will display the list in chronological order with the last piece of work at the top.