Mosaic

Lincolnshire COUNTY COUNCIL Working for a better future

Adults Quick Guide

Navigation Overview

This guide is intended for new workers who wish to gain a basic understanding of how to navigate around Mosaic.

Separate user guides should be used for more detailed information on how to use each section and functionality described in this guide.

Please note: Depending on your permissions you may not see all of the menu options, buttons or content that is displayed in this or any other user guides.

Workviews

There are three workview in Mosaic; **Full, Narrow** and **Closed workview**.

When you log into Mosaic, the default workview is the **Narrow workview**.

> Mosaic will retain your selection as to which section of the **Full workview** screen is open when you sign into the system – this will be visible in the narrow column on the left in **Narrow workview**.
>
> For example, If you were in the **Team workview** with the **Current work** section open and then sign out, the **Current Work** section, within the **Team workview**, will be open when you next sign in.
>
> Mosaic will also retain any organisation settings applied i.e. if you rearrange your **Current work** by **'Date'** it will remain arranged by **'Date'** until you change the setting.
>
> Mosaic will also retain these selections throughout your sign in session – the section you have opened will be open until you close it, or open a different section and the work/information will be organised as per your chosen setting.

To change which workview you are viewing you must click the corresponding icon:

- **Show Full workview** icon (becomes **Full Workview** icon when in Full workview)

- **Show Narrow workview** icon (becomes **Narrow Workview** icon when in Narrow workview)

- **Show Closed workview** icon (becomes **Closed Workview** icon when in Closed workview)

Full workview

The **Full workview** is split into three sections when in your **Individual workview** or two sections when in the **Team workview**, and it also has buttons in a menu on the right side of the screen.

Refer to the **Full Workview** user guide for further details.

Closed workview

The **Closed workview** either shows your Homepage, a worker's record, a team (organisation's) record or a person's record (**Person summary** screen) and the main header menu across the top of the screen.

Narrow workview

The **Narrow workview** shows the three sections of your individual workview / two sections of the team workview (also visible in **Full workview**), plus the same information as **Closed workview** – your Homepage, a worker's record, a team (organisation's) record or a person's record (**Person summary** screen) and the main header menu across the top of the screen.

Menu Buttons in Full workview

The buttons available in the menu in **Full workview** give the options to **Find person** (search for a person), **Find worker** (search for a worker) or **Sign out**.

The **Sign out** button should be used to log out before closing Mosaic.

Alternatively, the **Sign out** option can also be accessed from in the top right hand corner when in the **Narrow** and **Closed workviews**.

Refer to the **Full Workview** user guide for further information

Working on Behalf of Others (Act For)

The act for functionality is available in the **Narrow** and **Full workviews.**

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.

You can access another worker's individual workview by clicking the **Show workers available to act for** icon and then selecting the worker from the dropdown menu. This dropdown menu will only list the workers you have been set up to 'act for' – the workers will be listed alphabetically by surname.

The **Show workers available to act for** icon will change when you are acting for another worker.

The **Allocations** and **Current work** sections for the worker you have chosen will be available to access.

Caution should be taken to ensure that the correct worker name is displayed if switching between worker caseloads.

Refer to the **Acting for Others** user guide for further details

Team workview

The **Team workview** is available in the **Narrow** and **Full workviews** and is accessed by clicking the **Show team workview** icon

At the top of the **Team workview** screen you will see the name of the team you are a member of.

Clicking the **team name** button gives the options to view work for the team (default setting), view a list of team members (including team inboxes), view sub-teams and view a list of sub-teams members (if your team has any sub-teams).

The Team workview is split into two sections: **Team summary** and **Current work**.

Each section can be opened (expanded) or closed (collapsed) by clicking on it.

> Remember - Mosaic will retain your selection as to which section of the screen is open when you sign into the system.
>
> Mosaic will also retain any organisation settings applied i.e. if you rearrange **Current work** by **'Date'** it will remain arranged by **'Date'** until you change the setting.

If you open a section it will remain open until you close it again or open a different section.

Only one section can be open at once – opening a section will automatically close the other section, but both sections can be closed at the same time.

The **Team summary** displays as a table.

The number displayed in brackets next to **Team summary** denotes the total number of rows in the table.

The top row of the table displays the allocations and workload for the team.

The subsequent rows display the allocations and workloads for each member of the team, any team inboxes and any sub-teams.

The information displayed tells us how many **Allocations** each worker has (the number of open worker relationships) and the **Workload** assigned to each worker/inbox/team – how many **Incomplete work**, **Incoming work** and **Future work**

The **Current work** section is found underneath the **Team summary**.

The **Current work** section is split into folders – you will only see a folder if there is at least one piece of work in that folder.

The default display for the **Current work** section is to be organised by Type (type of work/task).

In total there is a maximum of three folders you are likely to see for work assigned to the team, **Incoming work**, **Incoming requests**, and **Future work**.

Refer to the **Managing Team Workflow** user guide for full details

Individual Workview

Your **Individual workview** is available in the **Narrow** and **Full workviews** and is accessed by clicking the **Show indivual workview** icon

There are three sections: **Allocations**, **Recently viewed** and **Current work**.

> Remember - Mosaic will retain your selection as to which section of the screen is open when you sign into the system.
>
> Mosaic will also retain any organisation settings applied i.e. if you rearrange **Current work** by **'Date'** it will remain arranged by **'Date'** until you change the setting.

- Each section can be opened (expanded) or closed (collapsed) by clicking on it.
- If you open a section it will remain open until you close it again or open a different section.
- Only one section can be open at once – opening a section will automatically close the other section, but all sections can be closed at the same time.
- Clicking a yellow folder in any of these sections displays its contents
- Clicking on the person's name will open the **Person summary** for that person (Mosaic will automatically display as Narrow workview – even if previously in Full workview).
- Clicking on the **Title** hyperlink for any work will open the **Workflow Step Summary** screen for that workflow step/ the workflow step the task was sent from.
- Clicking the worker/team name hyperlink in the **Assigned to** column will display information about the team or worker the workflow step is assigned to (column not visibly in Current work section).
- The **Priority** column displays the urgency of the task; a red flag denotes that the task is urgent. If you have sufficient system permissions, you can change the priority by clicking the priority icon and selecting the appropriate priority level from the menu

- The **Date** column displays the date the task was sent / is scheduled for.

- The **Note** column displays notes added to the workflow step when assigned to the worker or team. If the note is longer than the text displayed the text can be clicked to open a popup window to display the full note.

- If you hover the cursor over a **work** icon it changes to a **yellow cog** and displays a dialogue box describing what the workflow step is.

  If you left click this **yellow cog** you will see a list of actions you can take, which will vary according to your role and the type of work you are looking at:

  - You can start/resume any work assigned to you, a member of your team, or your team by selecting **'Start work/Resume work'** from the mini menu.

  - You can re-assign work by selecting **'Update assignment'** from the mini menu. Refer to the **Assigning Work** user guide for full details.

  - You can view the 'assignment history' of any of the workflow steps within the folder by selecting '**Assignment history'** from the mini menu**.** This shows you who assigned the work, where and when.

  - You can click the **Add to calendar** option to add an appointment in your outlook calendar based on the scheduled date of the work

  - Depending on your system permissions, you may also be able to cancel **Incoming** and **Future work** by selecting **'Cancel work'** from the mini menu. You will have to record a reason and for audit purposes it would be visible on the record that the work had been added and then cancelled.

Allocations

The **Allocations** section displays a list of cases (people) which you have an open worker relationship (involvement) recorded on their record.

The number displayed in brackets next to Allocations denotes the total number of people listed in that section.

For each person the number in the first set of brackets is their Mosaic ID number and the number in the second set of brackets tells us how many workflow steps are currently on their record (incoming, incomplete and future work).

Recently viewed

The **Recently viewed** section displays up to the last 15 records (people) you have accessed.

As with the Allocations section, for each person the number in the first set of brackets is their Mosaic ID number and the number in the second set of brackets tells us how many workflow steps are currently on their record (incoming, incomplete and future work).

Current work

The **Current work** section displays folders for:

- **Incoming work** - work not yet started
- **Incoming requests** – messages, additional tasks and information – requests and notifications
- **Incomplete work** - work started but not finished
- **Future work** -work due to be completed in the future
- **Alerts** - alerts from a case note

Please note: If there are no tasks of a particular type assigned to you that folder will not display within the Current work section.

Refer to the **Managing Individual Workflow** and **Full Workview** user guides for further details

Homepage

The **Homepage** displays in **Narrow** and **Closed workviews** when you first log 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 main header menu across the top of the screen.

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

Recent work, **Unfinished case notes** and **Alerts** can be accessed by clicking the Title hyperlink relating to that item of work.

Clicking on the person's name (subject hyperlink) accesses the record, opening the Person summary screen.

Each section displays up to 5 entries, to view further entries click the next page number or the **Next** or **Last** buttons.

Note: The **Workview state** icons (to change which workview you are viewing) and the option to **Sign out** of Mosaic are always visible in the main header menu across the top of the screen when you are viewing your Homepage.

Refer to the **Using the Homepage** user guide for further details

Person summary

The **Person summary** screen can be accessed by clicking the person's name (Subject) hyperlink from within any section of your individual workview or the Team workview, on your Homepage or by completing a person search (Find person).

The screen displays the main header menu across the top of the screen, sections (boxes) containing information about the person and a sidebar menu (down the left side of the screen).

There is a **Person Identify bar** at the top of the **Person summary** screen. This shows the person's name, Mosaic ID number, date of birth, age, and / or date of death and age at death. The bar is '**sticky**' so will remain at the top of the page when scrolling down the screen.

Section Headings

Once related information has been recorded on a person's record a corresponding section heading will display on the Person summary screen.

The section heading on the Person summary screen are organised in two columns.

Many of sections have hyperlinks, buttons or icons within them which can be clicked for access to more information. Some examples are:

- To change or add information within a section (where possible) click the **Change** hyperlink or button within the section.

- To access (start or resume) current work, click the **work** icon within the **Current work** section (this icon varies based on type of work), and then select **Start work** or **Resume work**. These options will only show for steps you are permitted to record - usually those assigned to you, a member of your team or your team.

- To access the Workflow Step Summary screen for any current workflow steps click the **workflow step name** hyperlink within the **Current work** section.

- To view a map of the person's current display address, click the **View map** hyperlink within the **Demographic information** section under the heading **Address**

- To open an e-mail to the person, click the **e-mail address** hyperlink within the **Demographic information** section under the heading **Contact details**

- To access the record of a relative, click the **relative's name** hyperlink in the **Personal relationships** section.

- To access the record of the workers or teams, click the **Professional/Organisation's** name hyperlink in the **Professional and organisational relationships** or **Current work** sections.

- To access information in the **Notes** or **Warnings** sections, click the relevant hyperlink within the section.

Buttons in Section Headings

The **Current work** section has buttons linking to History (Work history) and the Workflow map.

The **Personal relationships** section has a button linking to the Genogram.

History (Work history)

The **History** button is located within the **Current work** section and is used to access the Work history section

When clicked it displays a screen listing all workflow steps that have been assigned (incoming and future), started (incomplete) and completed (finished) on the person's record.

The **Work history** screen opens over the Person summary screen, it does not open in a separate window.

Summaries of the workflow steps (Workflow Step Summary screen) can be accessed by clicking the **Work** hyperlink.

For Incomplete, Incoming and Future work (assigned to you, a member of your team or your team) can also be started or resumed by clicking on the **yellow cog** icon in the actions column and the clicking on the appropriate option from the dropdown menu.

Mosaic will filter the contents of the Work history table as you type into the **Search** field.

You can choose how many entries to display using the **Show entries** dropdown menu.

To close this screen, click the **History** button again.

Refer to the **Work History** user guide for further details

Workflow map

The **Workflow map** button is located within the **Current work** section.

When clicked it opens a separate window displaying the Workflow map for the person. It is closed by clicking the **Close** icon within the **Workflow map** screen.

The Workflow map displays Completed, Incoming, Incomplete, and Future work.
For a key to the map click the **Key** icon - this tells you what the colours and symbols mean

To view all workflow maps on the record click the **View workflows** icon - a new workflow map is created whenever work is started from the Start sidebar menu on a person's record

- The **green dot** indicates an active/ongoing workflow.
- The **green tick** indicates the workflow that is currently being displayed.

Click the **Start** button to access and start Incoming or Future work (only visible for work assigned to you, a member of your team or your team)

Click the **Resume** button to access and continue Incomplete work (only visible for work assigned to you, a member of your team or your team)

Click the **Summary** button to view the Workflow Step Summary screen for that workflow step.

The **Next Actions** button displays all the available Next Actions for that workflow step.

Refer to the **Workflow Map** user guide for further details

Genogram

The **Genogram** button is located within the **Personal relationships** section.

When clicked it opens a separate window displaying the Genogram (family tree diagram) for the person. It is closed by clicking the **Close** icon within the **Genogram** screen.

The Genogram populates using the relationship information recorded within the person's record.

The **Key** icon displays a key describing the various symbols and icons on the screen.

The **Scope** icons display the Genogram with increasing numbers of generations from one through to three or more. There are three **Scope** icons – small , medium and large . Medium is the default scope.

To print the Genogram, click the **Export to PDF** icon

Refer to the **Genograms** user guide for further details

Main Header Menu

The main header menu is available in **Closed** and **Narrow workviews** and contains the **Home** and **Sign out** options.

It also contains dropdown menus for searching for **People**, **Organisations** and **Workers**.

The options that display for you depend on your role and system permissions.

The **Help** dropdown menu displays **Procedural help** which, when clicked will open the **Mosaic Hub** in a separate browser window.

Sidebar Menu

The sidebar menu is only available in the **Narrow** and **Closed workview**, once a person's record has been accessed.

Options displayed in the sidebar menu vary based on your role and system permissions.

Clicking or hovering over a sidebar menu option with an arrow opens an extended menu.

Clicking or hovering over the **Start** sidebar menu option displays a popup window which lists hyperlinks to starting steps e.g. Adult Contact (Open Case).

Workflow Steps

The first workflow step in most Adult Care workflows is usually a Contact step, or Notification step for hospitals.

Refer to the **Working with Workflow Steps and Forms** or relevant specific user guide for further information.

When a workflow step is recorded, the final stage of that step is to record at least one 'next action' within the **Next actions** section. Next actions show what is to happen next and who will do it. The next action is chosen from a dropdown menu and a worker, inbox or team is assigned to complete that step as appropriate.

Refer to the **Next Actions** user guide for further information

Requests can also be sent from within a workflow step. The 'Requests' icon displays a list of requests and/or notifications available from that step.

- Requests - Ask another worker to do something. Requests will prevent the step from being finished while outstanding.
- Notifications – Are sent to a worker to inform or notify them. Notifications do not prevent the step from being finished.

Refer to the **Requests and Notifications** user guide for further information