

## **Mosaic Bulletin #12. 2**

### **Mosaic Request Authorisations - Managers**

When a member of your team or another team is completing certain Mosaic Requests via MyPortal an authorisation is required before we can start working on the request. This authorisation will come via email to the managers email account. Dependent on how you have your email account configured may mean this authorisation email will come into your inbox. However, we have recently been informed that some managers have had authorisation emails go into other outlook inboxes. Can we please ask that you regularly check all your inboxes for authorisation emails as sometimes this can cause significant delays to requests being actioned.

### **Adult My Assessment and Review**

Before completing (green ticking) the My Assessment, please make sure you have added the Initial Review Conversation next action. This will then show in the person's current work as My Review. For more information, please refer to [Assessment, plan and review activity - hints and tips – Professional resources \(lincolnshire.gov.uk\)](#) and the Area, LD and LPFT social care workflow map - [Workflow maps – Professional resources \(lincolnshire.gov.uk\)](#)

### **Ending Services Post Strength Based Forms Go-Live.**

It has been identified that there are instances where workers require an End Service Request where they are not closing a case, however, they do not have the workflow to access this. In these instances where cases will not be being closed, workers are to submit a How Do I ticket via the portal (link below) MDaS Team will support with accessing an End Service Request on the record if appropriate. [Service Desk : . \(freshservice.com\)](#)

Where a case is being closed, workers are to complete the Proposed Case Closure workflow and Business Support will end services as part of their closure process

### **Reminder – Recording Personal relationships**

When completing workflow, it is often necessary to create and then add or find personal relationships (e.g. family members, friends or neighbours) so that their details pull through into the workflow step. Some common examples include:

- Adding carer(s) details
- Adding a friend who is involved in the completion of an assessment or review
- Adding a person who is responsible for paying a third party top up

When creating a new person's record to add to workflow, it is important that you also remember to record the personal relationship on the Person summary screen. This is vital to ensure that all records are linked to the relevant person's record and can be retained using the correct retention criteria. For further guidance please refer to the [Personal relationships](#) user guide.

### **Virtual Workers**

#### **What is a Virtual Worker?**

Virtual Workers (VW) are fictional workers on Mosaic that you can assign Worksteps to. They are primarily used by Business Support teams and act as a holding inbox to allow you to assign a Workstep to a worker without naming a specific person. Once a step has been assigned to a Virtual Worker, any worker that has access to the Team Workview can pick up work from the Virtual Worker. The Staff can complete or reassign that work as appropriate. It can also be used to facilitate assigning of work steps to a waiting list that cannot yet be assigned to a single worker.

## **Assigning Next actions and Virtual Worker inboxes**

Care is needed to ensure that next actions are assigned correctly, especially if they are being assigned to a virtual worker inbox. If they are assigned to the incorrect worker/virtual worker, then they may not get actioned as expected.

Whilst next actions on a restricted record can be sent to a Virtual Worker however, the team who manage that VW inbox won't be able to see or deal with it until they have access to the record. Therefore, we suggest adding a short concise Assignment note when assigning the next action to a virtual worker

For anyone using a virtual worker inbox, please check the inbox regularly to check for any work steps that may have been assigned incorrectly.

## **Case Note Alerts should not be assigned to VW**

Case Note Alerts should not be assigned to a Virtual Worker as they can't be acknowledged if they are assigned incorrectly.

## **Referring to In House Day Service**

Practitioners can refer a person to the In House Day Service (Day Opportunities) in Mosaic using the Adult Referral to In House Day Service step. This step is only available from the Start > New... sidebar menu.

Once a decision has been made by In House Day Services as to whether they have accepted the referral or not, they will send you a notification from the Adult Day Ops How Can We Help You step. This will display in your Incoming requests folder.

For more information please refer to the Referring to In House Day Service user guide available on the [Referring to in-house day service – Professional resources \(lincolnshire.gov.uk\)](https://lincolnshire.gov.uk) on the Mosaic Hub.

## **Requests for Home Care – Addresses**

There may be occasions where you need to request a package of care for a person when they are residing at a Temporary Address which may be recorded on Mosaic. For example, if they are in a Temporary Residency placement or if they are moving home.

Brokerage require the home address on the Purchase Service Request to reflect that of the address where the homecare provider will be delivering the support. To achieve this, you can do the following in Mosaic on the person's record:

- Before opening the Purchase Service Request go to the person summary screen click on Person details and then Addresses
- If the address where the home care is going to be delivered is already listed here, click on the pencil against that address. In Address settings ensure that Primary Address is ticked. Save this and then go back to the person summary screen.
- Now open the Purchase Service Request and the address will be displayed in the Person Details section of the Purchase Service Request.
- Complete the Purchase Service Request as per the usual process and send the appropriate next action to Brokerage.

Please remember to end the Temporary Address and amend the address where the home care is being provided to the Display Address which is found in the Address settings.

### **Penderels Trust form in Mosaic from August 2023**

Following a review of the Penderels referral form in Mosaic, a slight change was introduced in August. You will now send the referral as a clipboard request (as opposed to a clipboard notification as it was previously). This will enable Penderels to accept the referral and notify the referring practitioner, or return the referral if more information is needed. If a referral is returned to you for more information the step will be highlighted in red in your current work > incomplete work.

The Direct Payments Referral to Penderels will be available as a 'send immediately' next action to select from various workflow steps where Direct Payments are being considered, including the assessment and review. The referral should be 'assigned to self' for completion before sending to Penderels - Inbox.

**Please only cancel a referral to Penderels if Direct Payments are no longer being considered. To cancel a referral workstep that has been started but is no longer required, please add a note in the clipboard request to say referral is being cancelled / abandoned and Penderels will complete the request so the referrer can finish ('green tick') the workstep.**

To cancel a referral to Penderels that has already been submitted and accepted via Mosaic, please contact Penderels Trust by phone or email to let them know the person is no longer considering Direct Payments.

For further guidance please refer to [Referring to other teams and services – Professional resources \(lincolnshire.gov.uk\)](https://lincolnshire.gov.uk)

### **Completion of Purchase Service Request and Adult Homecare / Shared Lives Services Required next action**

This is a gentle reminder to practitioners that when completing a Purchase Service Request, if there are ongoing brokered services in place and there are no changes to service in this PSR, you do not need to send Brokerage a next action of Adult Homecare / Shared Lives Services Required as there are no changes to the brokered service.

This may occur when you are changing another service in place for the individual, such as a Direct Payment or Residential Service, but not amending the brokered homecare. In these instances, Brokerage do not require a Adult Homecare / Shared Lives Services Required as this can cause further confusion if nothing has changed.

If there is only Brokered Homecare Services in place and these are not changing, please note you do not need to be completing a Purchase Service Request. A Purchase Service Request should only be completed for changes or new services.