Adults Quick Guide

Working with Workflow Steps and Forms

This guide contains:

Starting or Resuming a Workflow Step

For best practice it is recommended that you start / resume work from within a person's record.

To start/resume a workflow step:

- Click the **Incoming work** icon / **Incomplete work** icon within **Current work** on the **Person summary** screen

- Click **Start / Resume work** from the menu

For **Incoming work**, if the workflow step is assigned to another worker or your team you will see a popup window – click 'Yes' to continue opening the workflow step and Mosaic will automatically assign it to you the first time you save.

If the workflow step you need to complete is not showing in **Current work** you may need to select it from the **Start > New…** sidebar menu.

The **workflow step** will always open in a separate window

Mosaic also allows you to start some **Forms** and **Letter** templates outside of workflow via the **Documents** > **Create** button. The options available to select is limited and will depend on your role and system permissions. This option should only be used if you are not within a workflow step / have already used the form within the workflow step and need an additional copy.

> Due to a known system 'glitch', it is recommended that if you have had workflow step open for more than an hour, you:
>
> - exit the workflow step using the **Close** icon
>
> - click into another section within the person record, as this will refresh the screen
>
> - return to the **Person summary** screen
>
> - click the **Incomplete work** icon for the workflow step within **Current work** and then click **Resume work** in the mini menu to continue recording the step

Workflow Step Overview

All workflow steps in Mosaic have at least one **main (primary) form** for information to be recorded in.

In addition to the main primary form within a workflow step, some steps also display with additional primary forms to be completed. These additional forms cannot be deleted as they are associated with the workflow step.

Many workflow steps also have optional forms and letters which can be selected and completed as required. For further details please refer to the Creating Optional Forms and Letters section within this guide.

Each form will display as **separate tabs** within the workflow step window and each form is split into sections, which are accessed using the **Sections menu** down the left side of the screen.

You can use **scroll bars** in both the Sections menu (for longer forms) and on the right hand side of the workflow step window.

The scroll bar on the Sections menu will allow you to scroll up and down the menu.

The scroll bar on the right hand side of the screen will allow you to scroll up and down the section of the form you are currently viewing.

Workflow steps will all have **toolbar icons** across the top of the screen. Most steps have the same **toolbar icons** within them. For further details, please refer to the Toolbar Icons section in this guide.

Most text fields within forms are fully editable.

Rich textboxes contains all the editing and formatting icons you are familiar with using in Word.

The **maximise** icon expands the textbox to full screen and the **minimise** icon reduces it back down.

Mosaic does not have its own **spell checker** but it will spellcheck any text recorded if your browser (Google Chrome or Microsoft Edge) **spell checker** is turned on. Please refer to the **Spell Checker** user guide for further information.

At the end of each section (except **Next actions**) there is a **'Section completed'** checkbox.
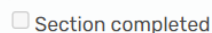
Tick this checkbox to indicate a section has been completed (a tick will appear within the Sections menu) – this is especially helpful when you need to exit the work and come back to it later and will assist if the form requires printing.

Marking a section as completed will not 'lock down' the section, it can still be accessed for further editing if required.

If you are unable to tick the **'Section completed'** checkbox, it means a mandatory question within that section still requires completion.

The first time a workflow step is saved, the **Next actions** section (last section of the main form in every workflow step) will become highlighted in red to indicate that at least one action must be recorded before the step can be finished. Refer to the [Recording Next Actions](#) section within this guide for further information.

Any other sections containing mandatory fields will also become highlighted in red and the step cannot be finished until these fields have been completed. For further information, refer to the [Mandatory Fields](#) section within this guide.

Toolbar Icons

The **toolbar icons** are available across the top left of the workflow step window.
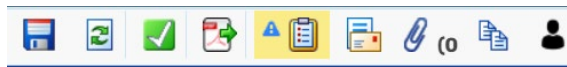
These icons allow you to carry out extra tasks related to your workflow step. For example complete additional forms, attach external documents and print the form.

The **toolbar icons** change if there are mandatory tasks, or optional forms or letters associated with the workflow step.

The following toolbar icons should be present when completing most workflow steps (the toolbar icons vary depending on which workflow step you are in):

Save 💾

The **Save** icon saves the workflow step.

This should be used throughout your input.

We recommend saving at least at the end of each section but the more often the better.

Refresh current form 🔁

The **Refresh current form** icon ensures any updated information (from the person's record) populates into the appropriate prepopulated fields - indicated by the **blue cog** icon ⚙️

This icon is usually used in conjunction with the **Show subject summary** icon 👤

Finish ✅

The **Finish** icon finishes the workflow step or gives a summary of what needs to be completed in the workflow step if there is anything mandatory still outstanding.

This icon should only be clicked once you are happy your recording is complete.

If your workflow step is being authorised it is usually the authoriser who will click this icon.

Output current document 📤

The **Output current document** icon generates a PDF version of the forms or letters within the workflow step. The PDF can then be saved, printed or emailed as required.

For steps with multiple forms or letters, you will need to ensure you are within the desired form/letter before clicking on this icon – each form / letter must be generated as a PDF separately.

Only finished versions of any documents should be shared with the person or their representative.

For further details refer to the [Printing a Form or Letter](#) section within this guide.

Requests 📋

The **Requests** icon only appears if there are requests and/or notifications associated with the workflow step.

The icon changes in appearance depending on whether there are any mandatory requests or notifications, and also whether a request has already been sent or not.

- The icon displays with no triangle 📋 if there are no mandatory requests or notifications, and no requests have yet been sent.

- The blue triangle 🔷📋 indicates that there is at least one mandatory request and/or notification which must be sent (and completed if a request) before the workflow step can be finished. It only displays with a blue triangle before the step is saved for the first time.

- The red triangle 🔺📋 indicates the workflow step has been saved and the mandatory request and / or notification has not yet been sent, or at least one request has been sent and not yet completed.

Clicking on the **Requests** icon displays the **New request** window. The available requests and/or notifications are listed and any that are mandatory are prefixed with '**Required**'.

Workflow steps often have mandatory and/or optional requests and notifications (or a combination of both).

For further details please refer to the [Sending Requests and Notifications](#) section within this guide.

Forms and letters

Clicking the **Forms and letters** icon opens a list of optional forms and/or letter templates (that are not automatically displayed as a tab within the workflow step window).

This icon is only present when there are optional forms or letters available.

For further details please refer to the [Creating Optional Forms and Letters](#) section within this guide.

View documents

The **View documents** icon allows related external documents to be uploaded (attached) to the workflow step.

The number in brackets will change to display how many documents have been attached.

Any documents attached here will be filed in the **Documents > Attachments** section of the person's record and will also be visible within the **Workflow Step Summary** screen for this step. Clicking on the **View documents** icon allows you to upload (attach) a document and also to view details of any documents already attached.

Please refer to the **Uploading Documents** user guide for further information.

Copy from

The **Copy from** icon is used to 'copy' information from a workflow step on one person's record to the same workflow step on another person's record (usually a family member).

To do this:

- o Record the workflow step on the first person's record
- o Start the workflow step on the second person's record
- o Click the **Copy from** icon
- o Select the first person (you wish to copy from) in the dropdown menu
- o Click the 'copy from' icon on the right hand side of the document you wish to copy from (if multiple forms appear in the list, you must ensure you are selecting the correct form by checking such details as the start and completion dates)
- o The data from all sections of the form will copy from the document you have selected; you should check this and update if applicable, so it is relevant for the person you are coping to and then complete the workflow step as per normal process

Show subject summary

The **Show subject summary** icon can be used to switch back to the **Person summary** screen – it will minimise the workflow step window and display a refreshed version of the **Person summary** screen.

It is very useful when you want to update prepopulated fields within the form (usually marked with the **blue cog**) .

- o Click the **Show subject summary** icon
- o Add/update the information on the person's record as appropriate (usually displayed on the **Person summary** screen)
- o When information has been added/updated, hover over the **Mosaic** icon / your internet browser icon in the task bar and click back into the workflow step window to return to it
- o Click the **Refresh current form** icon and any information added/updated on the person's record will prepopulate into the form

Close

The **Close** icon closes the workflow step window.

You will be prompted to save the changes made since last saving by clicking the **Yes** button, or cancel the changes by clicking the **No** button.

Other Icons and Buttons used in Forms

There are a number of other icons and buttons found in most workflow step forms.

Show guidance ?

Clicking the **Show guidance** icon displays help, prompts and guidance specific to the associated field.

This is usually practice guidance and/or will give you links to other useful websites.

Clicking this icon again will hide the guidance.

The information contained within these icons can be included when generating a PDF of the form by selecting the 'Guidance and prompts' options within the Include… section.

Blue cog

The **blue cog** icon indicates a prepopulated field.

The information cannot be amended within the form but if required, information can be edited on the person's record using the **Show subject summary** icon and then pulled through into the form using the **Refresh current form** icon as described previously.

Yellow cog

The **yellow cog** icon indicates a prepopulated but changeable field.

It allows information to be recorded or edited within the form where required. For best practice we suggest treating this like a **blue cog** and also updating the person's record where appropriate.

Delete

The **delete** icon is used to delete an item – row in a table, optional form etc.

Move up

The **move up** icon is used when there are several rows within a table.

Click the icon to move a row up and so rearrange the order of the items.

Edit Pencil

The **edit pencil** icon is used to edit an item – usually a row in a table.

Date picker

The **date picker** icon is used to select the appropriate date.

Date and time picker

The **date and time picker** icon is used to select the appropriate date and time.

Find button

The **Find** button can be used to find a person, worker or organisation to record their details within the form.

Clicking the **Find** button will open a **Find party** popup window with between one and four tabs (the number will vary depending on which form you are in and what the field within the form is asking for).

The tabs you may see are:

- **Find person** – used to search for members of the public i.e. the person you are working with, family, friends, neighbours etc
- **Find worker** – used to search for professionals e.g. named GP, colleagues etc
- **Find organisation** – used to search for an organisation e.g. GP surgery, charity, care agency etc
- **Manual input** (sometimes a button in the main form rather than a tab within the Find party window) – should be avoided where possible but can be used if the person / worker / organisation cannot be found and there is not enough information to create them / request they are created.

If you have searched for a person and can't find that person you can create a new person record (providing you have searched using different search criteria).

If you have performed a worker search or organisation search and can't find the worker / organisation you will need to contact the Mosaic Helpdesk by completing the relevant template in the [Mosaic Requests](#) forms.

Add button ⬚Add

The **Add** button is used to add information to a form via an additional popup window.

When a popup window has opened you will have three button options:

| Add | Add and close | Close |
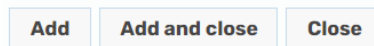
- **Add** – used to add the information and refresh the window to add more information

- **Add and close** – used to add the information and close the window

- **Close** – used to close the window without adding any information

Insert Section button ⬚ Insert Section

The **Insert Section** button is used to repeat a subsection within the form to allow further information to be recorded e.g. where a person has more than one carer.

Once the **Insert Section** button has been used two additional buttons appear:

⬚ Move Section Up   ⬚ Delete Section

- **Move Section Up** – used to move the section up (rearranging the order of the inserted sections)

- **Delete Section** – used to delete (remove) the section above the button

Mandatory Fields

A form within a workflow step usually contains a mixture of free texts fields, radio buttons, dropdown menus and date fields for information to be recorded.

In addition, there may also be hidden questions that only become visible when questions are answered in a particular way.

Mandatory or required fields within workflow steps are indicated with a red asterisk and / or a red message.

Some mandatory fields will be highlighted in red as soon as you start a workflow step, but once the step has been saved for the first time, any section with mandatory fields not yet completed will be highlighted in red and error messages are displayed against the mandatory fields to draw attention to those not yet completed.
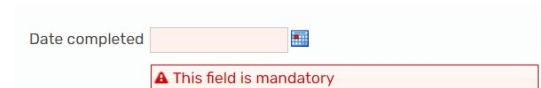

Creating Optional Forms and Letters

The **Forms and letters** icon can be used to open optional forms and / or letter templates (that are not automatically displayed as a tab within the workflow step). These are known as secondary forms.

This icon is only present when there are optional forms or letters available.

Once clicked an Optional forms and letters window containing a list of all available **Forms** and **Letters** opens.
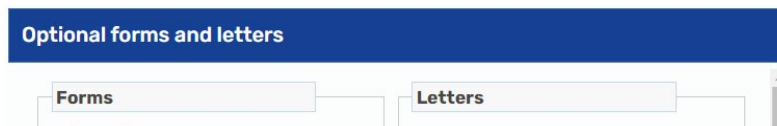
Choose the required form/letter by clicking on the relevant hyperlink – you can then click back onto the icon to repeat the process if multiple forms/letters are needed.

A workflow step can have several required (primary) and several optional forms and letters (secondary) open at the same time.

Optional forms and letters can and should be deleted if selected in error by clicking on the **Delete** icon 🗑 . You do not want blank forms or letter templates to be saved to the person's record.

You will also find that some of the optional forms and letters have mandatory fields and so you will not be able to finish the workflow step without deleting or completing the form/letter.

Refer to the **Using Letter Templates** user guide for further details about completing letters.

Sending Requests and Notifications

The **Requests** icon 📋 is used to send requests and/or notifications to an individual worker or team where required.

Workflow steps will have mandatory or optional requests and notifications, or a combination of both.

- **Requests** 📋 allow you to ask for a task to be completed.

  If a request has been sent the workflow step cannot be finished until it has been completed.

- **Notifications** 📋 allow you to notify another team or worker of important information relating to a workflow step.

  If a notification is sent it will not prevent the workflow step from being finished.

Click on the **Requests** icon 📋 to view the list of requests and/or notifications available to send from a workflow step. The list available will vary based on the workflow step.

The **Requests** icon will display differently depending on whether there are mandatory requests or notifications and whether the **Save** icon 💾 has already been clicked or not:

- The icon displays with no triangle 📋 if there are no mandatory requests or notifications, and no requests have been sent yet.

- The blue triangle 🔺📋 indicates that there is at least one mandatory request and/or notification and the **Save** icon 💾 has not been clicked

- o The red triangle ⚠️📋 indicates there is at least one mandatory request and/or notification and the **Save** icon 💾 has been clicked.

  Or it may indicate a request has been sent but not yet completed.

  The **Requests** icon will remain highlighted in red until the mandatory request and/or notification has been sent, and all requests have been completed.

To send a request or notification:

- Click on the **Requests** icon

The **New request** window opens

- Select the required request/notification using the radio button

- Add a Note in the text box if required

The option to **Pass to worker** and/or **Pass to team** displays

- Either click on the **Find** button to search for the relevant worker/team as appropriate

Or

- Select the worker/team name from the dropdown menu

- Click the **OK** button

The workflow step screen will redisplay and the request/notification will be sent when the workflow step is next saved.

If the request is mandatory (prefixed with **Required**), the workflow step cannot be finished until the request has been sent and completed.

If a request is not mandatory but has been sent the workflow step cannot be finished until the request has been completed, but it can be withdrawn if you no longer need it to be completed.

Requests that have not been sent can be edited or deleted if necessary.

If multiple requests and/or notifications need to be sent, once you have selected the first request/notification and have clicked then OK button, and then saved the workflow step you can click back on the **Requests** icon and then click **Send request**.

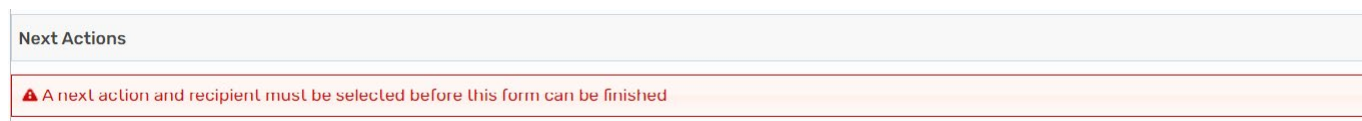Please refer to the **Requests and Notifications** user guide for further information.

Recording Next Actions

Next actions is always the last section of the main primary form within a workflow step.

This section is where you record the outcomes – what needs to happen next and who will do it.

Before a step can be finished, at least one **action** must be recorded within this section.

Until a next action has been added you will always see a red message at the top of this section to remind you to add at least one action.

Depending on how you have answered certain questions in the form you will be prompted to add corresponding next actions – again this will appear in red at the top of the section but only appears once at least one next action has been added.

Most next actions are assigned to the appropriate team, worker or team inbox for completion.

Some next actions are 'NFA' (no further action) actions and so do not need assigning. These are terminating actions, recorded purely for information and so do not generate a new workflow step.

To record a next action:

- Click the **Add** button

Next actions window opens

- Select action = Select as appropriate from the dropdown menu

Once you have selected a next action you may see a **Send Immediately?** checkbox (for applicable next actions only).

☐ Send Immediately?

Most next actions are only sent when the workflow step is finished, however if this checkbox is ticked the next action will send when the workflow step is next saved.

Once you have selected a next action you may also see **Pass to** options:

- o Pass to worker = Either click the **Find** button to search for a worker/team inbox, select a worker/team inbox from the dropdown menu, or click the **Assign to Me** button to assign the step to yourself for completion

- o Pass to team = Either click the **Find** button to search for a team or select a team from the dropdown menu
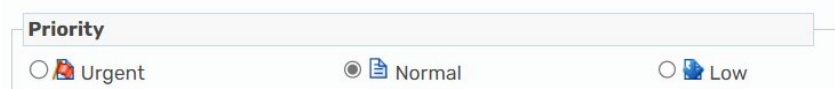
When assigning a next action you only need to select a worker or team – not both.

Remember some actions do not need assigning as they are terminating actions. These actions will not display the options to 'Pass to worker' or 'Pass to team'. These actions usually display **(NFA)** at the end of the action name.

Some next actions will have a **Scheduled date**, for example when reviews are selected as next actions. The scheduled date can be amended if required.

Some next actions will require a mandatory **Reason** to be recorded - usually selected from a dropdown menu.

- **Note** = A note can be added as appropriate. Advised when assigning an action to another worker, team inbox or team. A note is not usually required when assigning actions to yourself.

- **Priority** = Select appropriate radio button to indicate as Urgent/Normal/Low. The default setting is Normal. Use the Note field to explain why you are changing the priority.

Click the **Add** button to add the action and the select an additional action (repeat the process above) or click the **Add and close** button to close the Next actions window once no further actions are required.

Alternatively you can click the **Close** button to close the **Next actions** window without recording an action.

Some next actions have inclusion and exclusion rules attached to them. This means that they cannot be selected alongside other next actions, and some must be picked if a specific next action or answer within the form is recorded.

Mosaic highlights with a red message if additional next actions must be added. In addition, Mosaic will not allow you to add a next action if it is excluded for any reason, again this is highlighted with a system message.

Tips regarding next action status:

- **'Proposed'** = most next actions will say this – the action (workflow step) will only be sent once this workflow step is finished

- **'Proposed (Send on Save)'** = for **'Send immediately'** next actions before this workflow step has been saved – the action (workflow step) will be sent once this workflow step is next saved

- **'Sent'** = for **'Send immediately'** next actions after this workflow step has been saved – the action (workflow step) has already been sent

- **'Finished'** = for **'Send immediately'** next actions after this workflow step has been saved – the action (workflow step) has been sent and finished before this step has been finished

If an action should be 'sent immediately' and the status does not show as 'Sent' once you have clicked save, click the **edit pencil** icon to tick the 'Send Immediately?' checkbox and then click the **Save changes** button. Click the **Save** icon again and the status should then change to 'Sent'.

Important Note: For restricted records next actions cannot be assigned to a worker, team inbox or team unless the worker, inbox or team has been granted permission to access the record. Refer to the **Restricted Records** user guide and **Policy** document for further information.

Finishing a Workflow Step

The **Finish** icon ☑ is to be used once the workflow step is complete and no further input is required.

The step cannot be finished if there are any mandatory fields still incomplete and/or if there are any outstanding requests to be completed.

If the **Finish** icon is clicked while there are outstanding mandatory fields / requests a system message will display explaining the form cannot be finished as "mandatory items" are outstanding.

All steps must be completed to remove them from your **Current work** and to send any next actions not ticked as / able to be ticked as 'send immediately'.

The **Finish** icon is usually clicked by the authoriser if an authorisation request has been sent, though this will vary depending on particular practice and processes.

Once the **Finish** icon is clicked (and the step is able to be finished) the **Person summary** screen will display.

The workflow step will now be completed (finished) and the form(s) and letters completed within the step can be viewed in the **Forms and letters** tab within the **Documents** section in the sidebar menu.

Finished workflow steps can also be viewed by clicking the **Workflow map** or **History** buttons located in **Current work** on the **Person summary** screen.

Please refer to the **Documents Section**, **Workflow Map** and **Work History** user guides for further details.

A summary page for a workflow step can be accessed from the **Workflow map**, **Work history** and **Documents** sections. Please refer to the **Workflow Step Summary Screen** user guide for further details.

Printing a Form or Letter

The **Output current document** icon can be used to generate a PDF version of the forms or letters within the workflow step. This PDF can then be saved, printed or emailed as required.

Information in italics within the form will not display on the PDF output.

Only finished versions of a document should be shared with the person or their representative.

All finished forms and letters within a workflow step are stored in the **Documents > Forms and letters** section. They are also accessible from the **Work history** and **Workflow map** sections as described above.

The **Next actions** section contained within the main primary form will automatically appear on the output unless the **Output Options** are amended before printing.

To avoid printing the **Next actions** section, change the radio button from **All sections** to **Sections** and enter the number of sections to be included on the output before clicking on the **Output to PDF** button.

Alternatively, if the **Section completed** checkbox has been ticked for each completed section in the workflow step, the radio button for **'Completed sections only'** can be selected.

The output font size can be increased or decreased accordingly using the **font size slide**r. Left click and drag to set the required font size.

Where appropriate you must also ensure you tick to include **Verification information.** This is needed when printing assessments, plans or reviews to provide to the person/their representative as it will ensure the worker who completed the step, will display on the output.

When the **Output Options** have been selected:

- Click the **Output to PDF** button

Providing your screen is maximised, the PDF will display in the bottom right corner above the task bar.

When the output has been created if can be printed or emailed using the toolbar options displayed in the top right of the screen.

Please refer to the **Printing Documents** user guide for further information.