



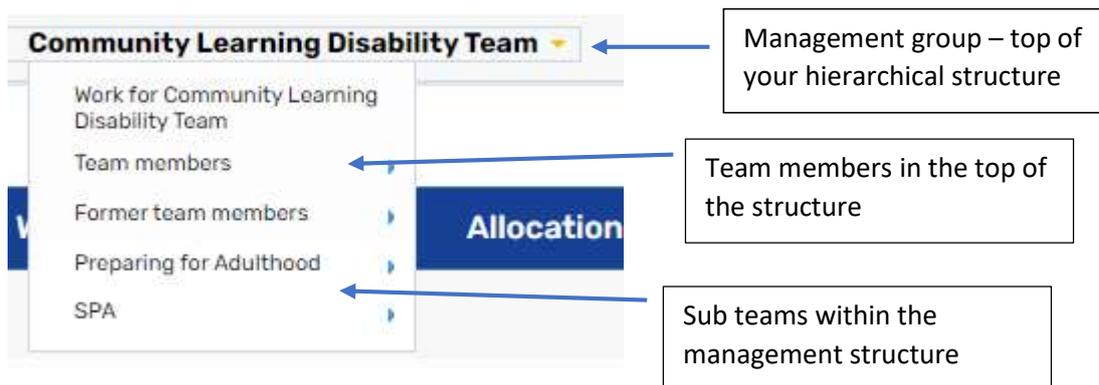
Quick Guide, Mosaic Adults

Using and Managing Team Workview

The Team Workview is accessed by clicking the **Show Team Workview** icon.  This is available under both Full and Narrow Workview. For best results use Full Workview. 

The Team Workview contains details of the team you are part of. It displays a list of other managers, workers and teams within your management structure. You can drill down to find information about the teams(s) you manage and the members of that team including their current work.

At the top of the Team Workview screen you will see the name of your Management area clicking on this gives you the options to view a list of team members and a list of sub teams within your area. You can view a list of team members for each sub team by clicking the team then clicking team members.



The screenshot shows a dropdown menu for the 'Community Learning Disability Team'. The menu items are: 'Work for Community Learning Disability Team', 'Team members', 'Former team members', 'Preparing for Adulthood', and 'SPA'. A blue box labeled 'Allocation' is overlaid on the 'Team members' item. Three callout boxes with arrows point to the menu items: 'Management group – top of your hierarchical structure' points to the team name, 'Team members in the top of the structure' points to 'Team members', and 'Sub teams within the management structure' points to 'SPA'.

Team Summary

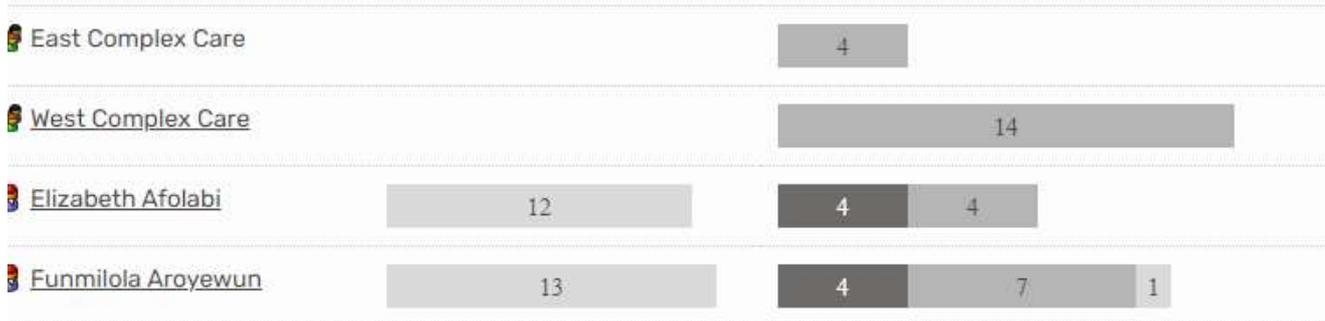
The Team Summary is opened by default when entering the Team Workview, this can be closed and opened by clicking on the Team Summary heading.

The Team Summary displays as a table, the top row of the table displays the allocations and workload for **the Team**.

Team summary (27)

| Worker/Sub-team ↑ | Allocations | Workload | | |
|--|-------------|------------|----------|--------|
| | | Incomplete | Incoming | Future |
|  Assigned to team | | 13 | | 14 |

The subsequent rows display the allocations and workloads for any sub teams, then members of the team



The information displayed tells us how many Allocations each worker has and the Workload assigned to each worker – how many **Incomplete Work**, **Incoming Work** and **Future Work**. These are displayed as various shades of grey



Please note: Any virtual worker boxes setup for the team will also display in the team summary, such as Duty Workers.

Clicking on a **workers name** hyperlink will show the individual workview for that worker, from here you can view their allocations and work that is assigned to them. You can also reassign work to another worker or team, either within your team or outside the team.

Clicking on a **sub team** hyperlink will show the summary for that team and any workers within that team

Assigning / Reassigning work

To assign work from one worker to another, you need to click on the workers folder, you will then see their incomplete, incoming and future work, ready for you to reassign , click **Assign Work**

You can choose to assign work to

- A member of your team or sub team
- A worker in another team
- Another team

You can also now choose the date the work is scheduled for **i.e you can bring a review forward or back**

Tip: This will work the same way when assigning work from the current work for your team

Current Work for the Team

The current work section is found **underneath** the Team Summary. **This only displays work for the current team.** Click on the current work to open it and display the work items assigned (passed) to the team. The current work section is split into folders – you will only see a folder if you have at least one piece of work in that folder.

The following folders may display in the Team Current Work section: **Incoming Work, Incoming Requests, Future Work.**

1. **Incoming work** – workflow steps assigned to the team but not yet started
2. **Incoming requests** – contains requests (tasks) such as proving additional information, reviewing or authorising workflow
3. **Future work** – workflow steps assigned to the team with a due date to start in the future

Please note: Incoming Authorisations, Alerts and Incomplete Work are not available to be assigned to the Team so these folders will never be visible in the Team Current Work.

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

Clicking on a **Yellow folder** icon expands the view to show the contents of the folder. Work items in each folder are displayed by default in ascending order by date.

Current work default view

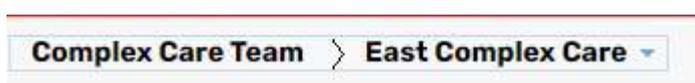
| Type ↑ | Subject | Title | Status | Priority | Date | Note |
|----------|--------------------------|--------------------------------------|--------|----------|-------------|------|
| Folder | Incoming work (3) | | | | | |
| Document | Alison Test (3000592901) | a_Adult Safeguarding Concern | | High | 18 May 2021 | |
| Document | David Test (1000067882) | a_Revise/Amend Care and Support Plan | | High | 18 May 2021 | |
| Document | Mikev Test (3000592902) | Carers Support Plan | | High | 18 May 2021 | |
| Folder | Future work (1) | | | | | |
| Document | David Test (1000067882) | a_Care and Support Plan Review | | High | 1 Oct 2021 | |

You can change how you are viewing the information within **Current Work** by clicking on the headings for each column. New folders will display which are organised by the criteria of that column; for example, by Date (ascending order). The column selected shows a white arrow denoting ascending or descending order. Click Date again to switch between ascending and descending order.

Current work sorted by date

| Type | Subject | Title | Status | Priority | Date ↑ |
|----------|--------------------------|--------------------------------------|--------|----------|-------------|
| Folder | Today (3) | | | | |
| Document | Alison Test (3000592901) | a_Adult Safeguarding Concern | | High | 18 May 2021 |
| Document | David Test (1000067882) | a_Revise/Amend Care and Support Plan | | High | 18 May 2021 |
| Document | Mikev Test (3000592902) | Carers Support Plan | | High | 18 May 2021 |
| Folder | October 2021 (1) | | | | |
| Document | David Test (1000067882) | a_Care and Support Plan Review | | High | 1 Oct 2021 |

To show current work for a **sub team** you will need to choose the sub team from the top drop down menu



Bulk Action

The bulk action facility allows you to

1. Reallocate some or all of the allocations for a worker
2. Reassign some or all of the current work for a team or worker

Bulk Allocation – Reassigning worker allocations

Allocations show as **Allocated Worker** on the person's front screen

To use the bulk allocation function you need to be in Full Workview, choose the worker you need to reassign the allocations **from** under team members

Then click **Bulk Assign**

Frameworki Support Team > Andy Hall

Allocations (3)

| Type | Subject | Title | Assigned to | Priority | Date | Note |
|--------|-------------------------|-------|-------------|----------|------|------|
| Folder | Carer Test (3000572887) | (1) | | | | |
| Folder | David Test (1000067882) | (16) | | | | |
| Folder | Lally Test (3000572886) | (4) | | | | |

You can then choose the allocations you need to reassign by clicking the check boxes

Bulk action

Show 15 entries Search: []

| Person | |
|-------------------------|-------------------------------------|
| David Test (1000067882) | <input checked="" type="checkbox"/> |
| Andy Test (3000592941) | <input checked="" type="checkbox"/> |

then pass to another worker either in your team (drop down menu) or outside the team (find worker).

Bulk action

Show 15 entries Search: []

| Person | |
|-------------------------|-------------------------------------|
| David Test (1000067882) | <input checked="" type="checkbox"/> |
| Andy Test (3000592941) | <input checked="" type="checkbox"/> |

Showing 1 to 2 of 2 entries

Team worker# Allison Ramsey Show workers in sub-teams

Pass to worker# [] Find Clear

Preview assign Cancel

Then click **preview assign**, choose an end reason

Then click **Assign**. Allocations will then be transferred to the other worker.

End reason Case Transferred

Bulk Assign – Reassigning work

This works the same as bulk allocations. You will need to be in the **Current Work** for the worker or team, click **Bulk Assign**,

The screenshot shows a user interface for a support team. At the top, it says 'Frameworkki Support Team' and 'Andy Hall'. Below this, there are two sections: 'Allocations (2)' and 'Current work'. The 'Current work' section has a 'Bulk Assign' button circled in red. Below the sections is a table with columns: Type, Subject, Title, Status, Priority, Date, and Note.

| Type | Subject | Title | Status | Priority | Date | Note |
|---------------------|----------------------------|------------------------------|--------|----------|-------------|------|
| Incoming work (1) | | | | | | |
| 📄 | Alison Test (300059290) 1) | a_Adult Safeguarding Concern | 📄 | | 18 May 2021 | |
| Incomplete work (3) | | | | | | |
| 📄 | David Test (100006788) 2) | a_Adult Contact | 📄 | | 26 Nov 2020 | |
| 📄 | Andy Test (300059294) 1) | a_Basic Assessment | 📄 | | 1 May 2021 | |
| 📄 | Andy Test (300059294) 1) | Adult Purchase Service | 📄 | | 11 May 2021 | |

Choose the workflow items, by clicking the **check boxes on the right**, then assign to a team or worker and click **preview assign**, add a note and click **assign**. Work will then be passed to the worker or team chosen with an assignment note.

The screenshot shows a list of work items with columns: Subject, Title, Status, Priority, Date, Note, and a checkbox. The first item is 'David Test(1000067882)' with an unchecked checkbox. The second item is 'Alison Test(3000572861)' with a checked checkbox. The third item is 'Andy Test(3000572889)' with a checked checkbox. Below the list, there are options to assign to a team or worker, and buttons for 'Preview assign' and 'Cancel'.

| Subject | Title | Status | Priority | Date | Note | Checkbox |
|-------------------------|--------------------------------|--------|----------|------------|------|-------------------------------------|
| David Test(1000067882) | a_Adult Contact | | 📄 | 17/05/2019 | | <input type="checkbox"/> |
| Alison Test(3000572861) | a_Care and Support Plan Review | | 📄 | 17/02/2022 | | <input checked="" type="checkbox"/> |
| Andy Test(3000572889) | a_Care and Support Plan Review | | 📄 | 19/03/2022 | | <input checked="" type="checkbox"/> |

Showing 1 to 3 of 3 entries

Team worker# Show workers in sub-teams

Pass to worker#

Pass to team#