Quick Guide, Mosaic Adults

Workflow

Any form created from the **Start** menu on a customer's Person Summary screen will create **workflow** when saved. Most forms created are referred to as **workflow steps** e.g. Contacts, Assessments, Support Plans and Reviews.

Within most workflow steps there is at least one main form and there are also optional forms available via the **Forms and Letters** toolbar icon

To save your work when you are in a workflow step click the save icon every time you want to save your work.

If you wish to attach any documents within your flow step use the View documents icon (0)

If you wish to go back to the person summary when you are in a workflow step use the show person summary icon

If you wish to print your form you will need to output this to PDF click on the PDF icon to do this.

Before finishing any workflow step you will need to add relevant next actions. All workflow steps need at least one next action to be recorded before the step can be finished. The next actions represent the outcomes identified in the workflow step i.e. what has happened, what needs to happen and who needs to be made responsible for completing the next workflow steps (actions).

Next actions will be the last section on the first mandatory form within a workflow step and are shown as Actions Taken 5. Actions Taken

When workflow needs to continue, next actions are **assigned** or **passed to** an appropriate team or worker for completion. Some next actions are terminating steps and require no further action (NFA) these do not therefore need to be assigned to a worker or team.

It is important to continue existing workflow wherever possible to prevent the creation of multiple workflow. If you need to complete a piece of work that is not assigned to you, your Team or a member of your Team you will need to contact the Team/Worker it is assigned to and ask them to re-assign it to you or your Team. Continuing existing workflow also ensures information recorded in previous workflow steps is carried forward (prepopulated) to future steps

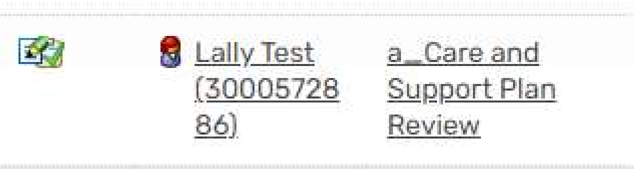
Once you have completed your form/s and added the appropriate next action/s most workflow will need an agreement by a Manager, in Mosaic these are known as **Requests** and are shown by this icon 

If the request to agree a workflow step is mandatory this will be highlighted, you will need to click on this and send the **required** Manager Authorisation request.

TIP: You will also use the requests icon to send work to Brokers, as this replaces tasks

Once you have sent the request close the workflow step by clicking on the red cross.

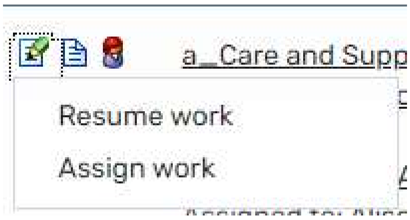
When the request has been sent this will show in your **current work** highlighted yellow



Once your manager has completed the request this will show in your current work with a tick next to the green pencil

You can now finish the workflow step, you can do this either from your current work or from the person summary screen, click on the pencil icon and **resume work** **(left click ONLY, there is no right click in Mosaic)**

Click on the **Finish** icon to complete the workflow step 



Viewing Workflow

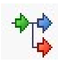
The **Current Work** widget on the Person Summary screen displays any new (incoming), incomplete or future work. It shows the title of the workflow step and the name of the worker or team that the step is assign to.

The Summary hyperlink allows you to view the **Workflow Step Summary** screen.

The Workflow map and History icon on the Person Summary screen can both be used to view both current and historic workflow.

The **Workflow Map** is a diagram providing a visual of the customer's journey. All workflow steps are colour coded to indicate whether work is incomplete, finished, incoming or scheduled for completion in the future.

The key icon  will show what the coloured borders represent, how to view next actions and other functionality displayed in the Workflow Map.

It is important to use 'View Workflows'  icon when viewing the Workflow Map in order to view all workflow record otherwise you will only see the most recent workflow created via the Start menu.

Current Work History displays the same information as the Workflow Map but in table format and is useful to see which worker/team workflow steps are/were assigned to.

The Documents Section (Sidebar Menu) contains two tabs; 'Forms and Letters' and 'Attachments'.
The 'Forms and Letters' tab contains all saved and finished forms and letters created in Mosaic. It will also show migrated forms from Frameworki. The Attachments tab contains any documents that have been uploaded (indexed) to the person's record.