## Quick Guide, Mosaic Adults

# Mosaic Guide for Managers

This guide is intended for Managers and covers the main tasks most Managers are required to complete in Mosaic.

## 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.


Management group – top of your hierarchical structure

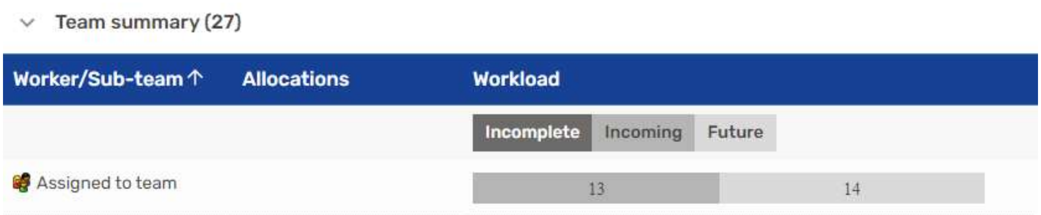
Team members in the top of the structure

Sub teams within the management structure

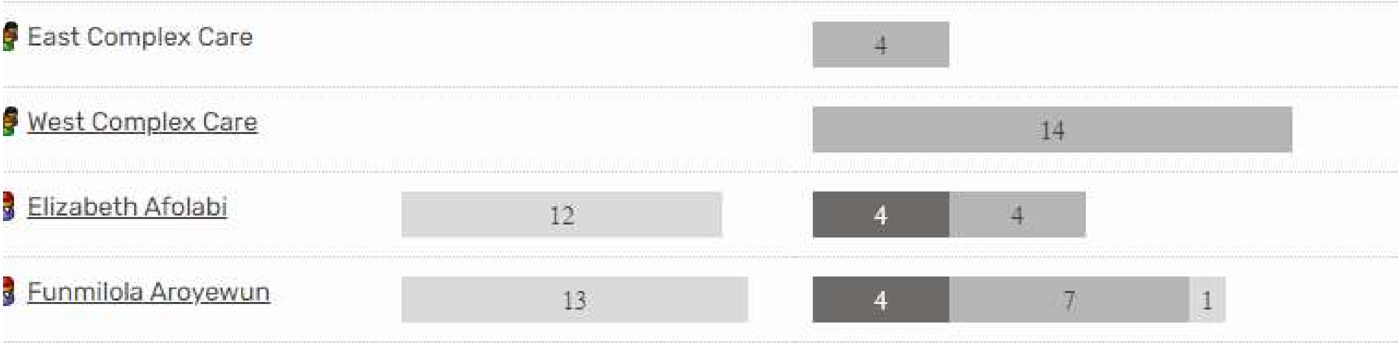
### Team Summary

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.

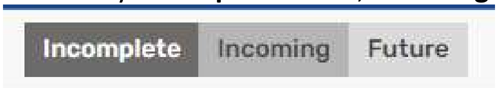
The Team Summary displays as a table, the top row of the table displays the allocations and workload for **the Team**.



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

**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.

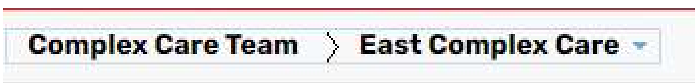
The following folders may display in the Team Current Work section: **Incoming Work**, **Incoming Requests, Future Work.**

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 sate 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 Workview.

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.
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.

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



Once you are in the current work folders the following applies

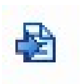
- Clicking on the person's name will open the person summary
- Clicking on the title of the piece of work will open the summary screen for that workflow step
- The **priority** column displays the urgency of the task, a red flag denotes that the task is urgent
- The **date** column displays the date the piece of work was sent to the team
- The **notes** column displays notes added to the workflow step when sent to the team

To assign work from team or worker folder left click on the icon to see a list of actions

### Work Item Icons

A number of icons are used in the **Team Workview** to represent different types of work. You will be able to do different tasks with each. Remember the options you see are dependent on your role and system permissions so you may not have all the options listed available to you.

Work items will have one of the following icons:

| Icon | Type of work item | Options |
|---|---|---|
|  | Incoming work | Start work<br>Assign work<br>Assignment History<br>Cancel work |
|  | Incoming request | Resume work ( choose this to complete request)<br>Assign |
|  | Future work | Start work<br>Assign work<br>Assignment history<br>Cancel work |

### 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

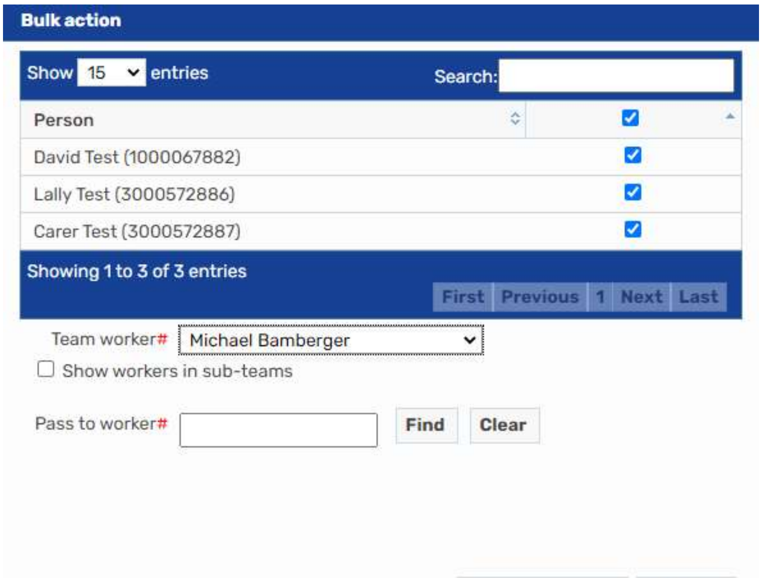
### Bulk Allocation


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

Then click Bulk Assign

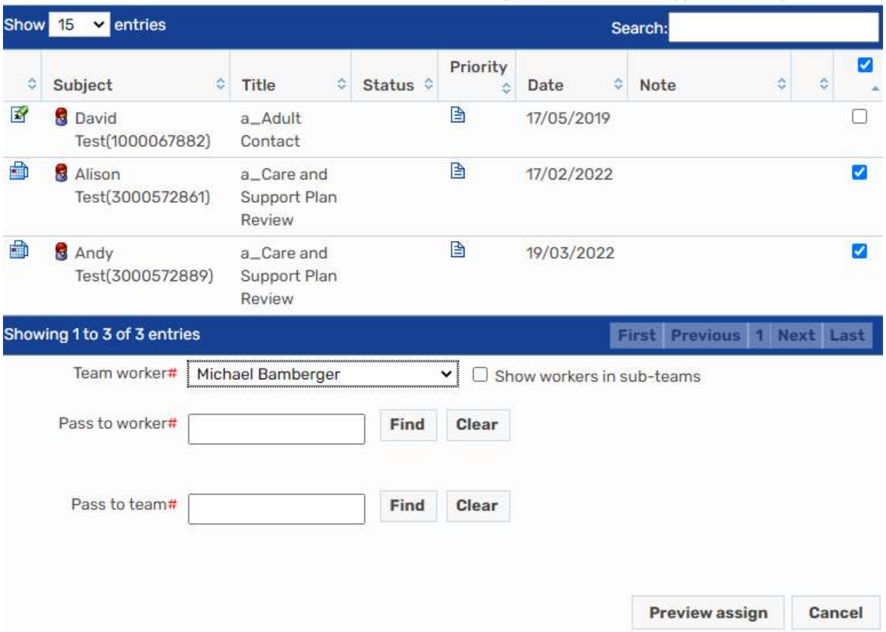
You can then choose the allocations you need to reassign by clicking the check boxes and pass to another worker either in your team (drop down menu) or outside the team (find worker). Then click **preview assign,** choose an end reason


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




**Bulk Assign**

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




**Assigning / Reassigning work**

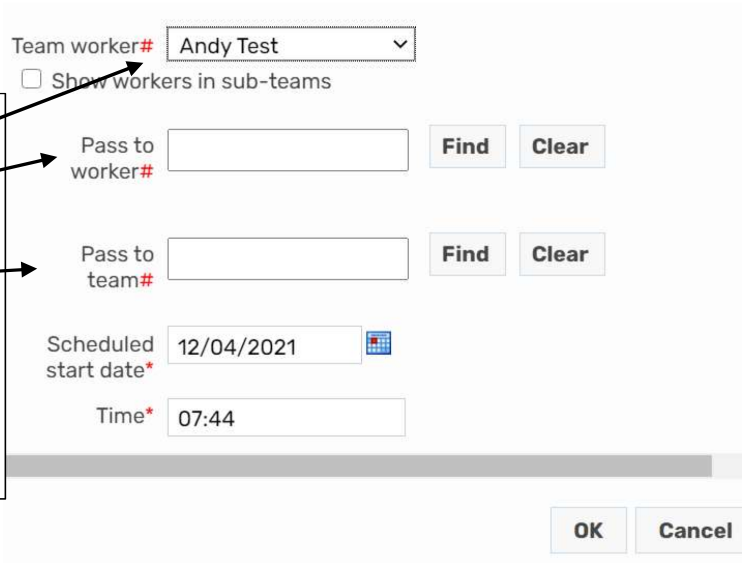
You can choose to assign work to

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

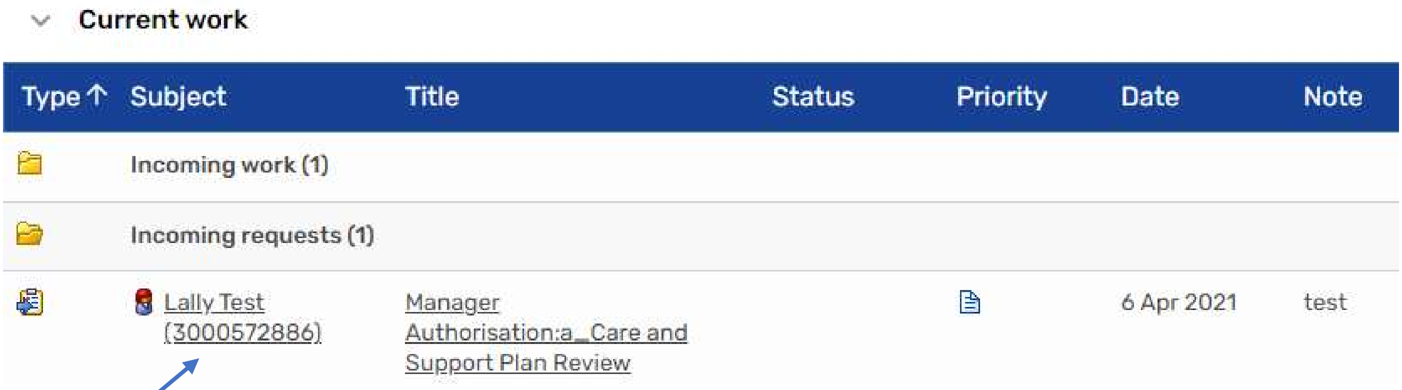


## Authorising Workflow Steps (Incoming Requests)

Most workflow steps contain a Manager Authorisation request (task in Frameworki). The worker completing the workflow step must send a Request from that step to their manager.

You will need to be in your **individual** workview to see your requests

The request will display in your Incoming Requests folder under your current work


Current work

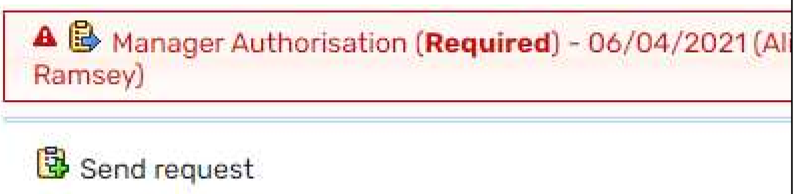
| Type ↑ | Subject | Title | Status | Priority | Date | Note |
|---|---|---|---|---|---|---|
| | Incoming work (1) | | | | | |
| | Incoming requests (1) | | | | | |
| | Lally Test (3000572886) | Manager Authorisation:a_Care and Support Plan Review | | | 6 Apr 2021 | test |

To view the person's record before accessing the request click on the subject name

To authorise the workflow item and complete the request, click on the title of the request. **The workflow step summary screen** will display

To authorise the workflow step you need to amend it, click **Resume** to amend the workflow step


Once you have checked the form and are happy to agree the work click on the requests icon , which will be highlighted red




Outstanding requests will display in red, click on the **red text box** to open the outstanding request

- To agree click Completed
- Click OK
- Click save icon
- You can now either finish the step
- Or close the step so the assessing officer can complete it

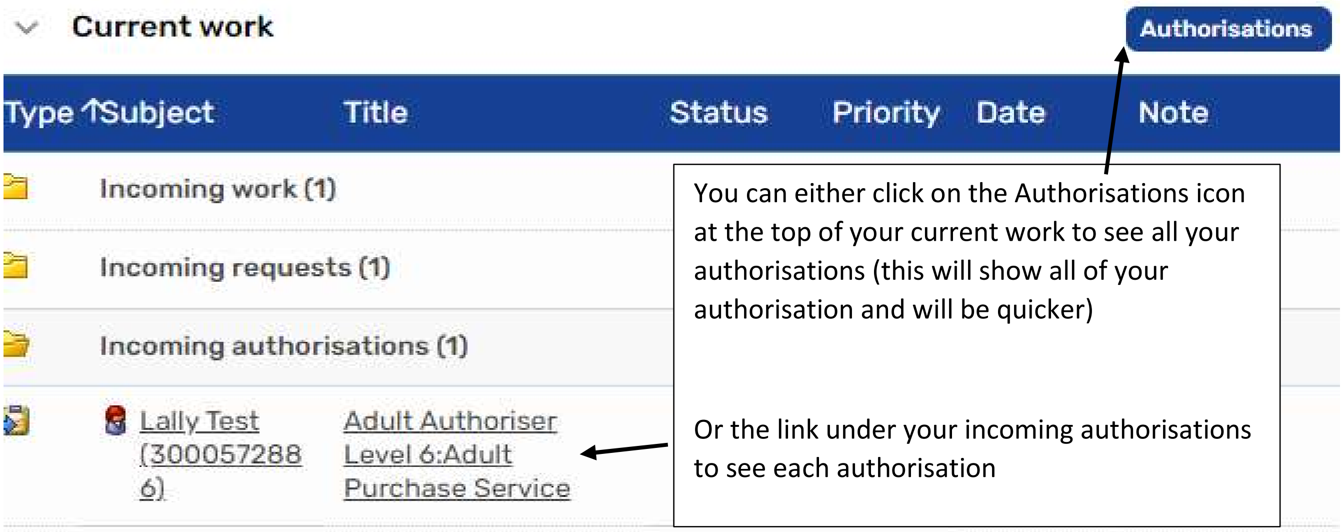
## Finance Authorisations (Incoming Authorisations)

When services are purchased these will need a Finance Authorisation by a Manager. Care Brokers will send you an authorisation from a Purchasing Workflow Step.

You will need to be in your **individual** workview to see your Authorisations

The request will display in your Incoming Requests folder under your current work

The request will display in your Incoming Authorisations folder under your current work




You can either click on the Authorisations icon at the top of your current work to see all your authorisations (this will show all of your authorisation and will be quicker)

Or the link under your incoming authorisations to see each authorisation

Authorising services work the same way as Frameworki, click on the service, click the Authorise radio button and **save**