

Quick Guide, Mosaic Adults

Completing Reviews Overview

If a client has existing services you should complete a **Review workstep** rather than a **Comprehensive Assessment workstep**. You can still select a **Comprehensive Assessment form** in the **Review workstep**.

If you are due to complete a Review for a client, there should be one assigned to you in your incoming work, if there is not you will need to speak to your manager to assign this to you.

▼ Current work

Type ↑	Subject	Title
📁	Incoming work (1)	
➕	Alison Aaatest (300057286 1)	a_Care and Support Plan Review

Current work

 [a_Care and Support Plan Review](#)
Assigned to: Alison Ramsey

Once a review is assigned to you, you can start this from 2 places
The client's front screen under **current work**
Under your current work folder in Incoming work
From both places click on the icon and choose **start work**

Once you have opened your Review you will need to choose which Review Form to complete, click on the forms and letters icon to display a list of forms available



Forms Guidance

Sections

1. Forms Guidance

Please choose the correct form from the forms and letters icon on the top menu



Optional forms and letters

Forms

[Adult Comprehensive Assessment \(2017\)](#)
[Guidance for Outcomes Forum](#)
[My Care and Support Plan Review/Revision \(2017\)](#)
[Outcomes Forum Request Form](#)
[Proposed Timetable / Further Actions \(2017\)](#)
[Ready Reckoner \(2017\)](#)
[Suitable Person Agreement and Authorisation](#)

Choose either the Adult Comprehensive Assessment form
OR My Care and Support Plan Review / Revision form. This will be the form you are completing for the review.
The form will then open up as a separate tab as below



When you are completing your review, click on the save icon to save your work. From the first save, any mandatory fields that haven't been completed will be highlighted in red.

This will show, the section where the mandatory field is, once you click on the section the mandatory fields will be highlighted as below

A 11. Health Conditions & other statutory data collection

Is this a COVID-19 case?



Suspected COVID-19 case

Confirmed COVID-19 case

Mandatory Field

Once you have completed your review form you will need to add the next actions (outcomes). In the review these are under the Forms Guidance for, click on the **Actions Taken** section

1. Forms Guidance

2. Actions Taken

indicates completed section

Click Add to add the next actions required and choose the appropriate outcomes. (These will be the same as Frameworki)

2. Actions Taken

Next Actions

A next action and recipient must be selected before this form can be finished

Next actions					
action	Assigned to	Reason	Note	Priority	Status

You will now need to send this to your Manager for authorisation, in Mosaic these are known as Requests and are shown by this icon. The request to agree the review Workstep is mandatory so will be highlighted.

Once you have sent the request close the workflow step by clicking on the red cross, remember to save your work.

	<u>Lally Test</u> (30005728 86)	<u>a_Care and</u> <u>Support Plan</u> <u>Review</u>
	<u>Lally Test</u> (30005728 86)	<u>a_Care and</u> <u>Support Plan</u> <u>Review</u>

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

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

You can now send the workflow step to brokers, to do this you will need to **amend it** and send another request, 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)**



Once you are in your review workstep click on the Requests icon and choose **Send request**, choose **Pass to Care Brokers** and pass to the Care Brokers Team.

Next Save and Close your Review Workstep  **Brokers will Finish this and complete the PO for any changes**

<input checked="" type="radio"/> Pass To Care Brokers
<input type="radio"/> Pass To Forum Admin

Note

Pass to worker*

Pass to team*