

Mosaic User Guide

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This guide is intended to give an overview of Mosaic and how to use it. For detailed practice guides please search Tri.X

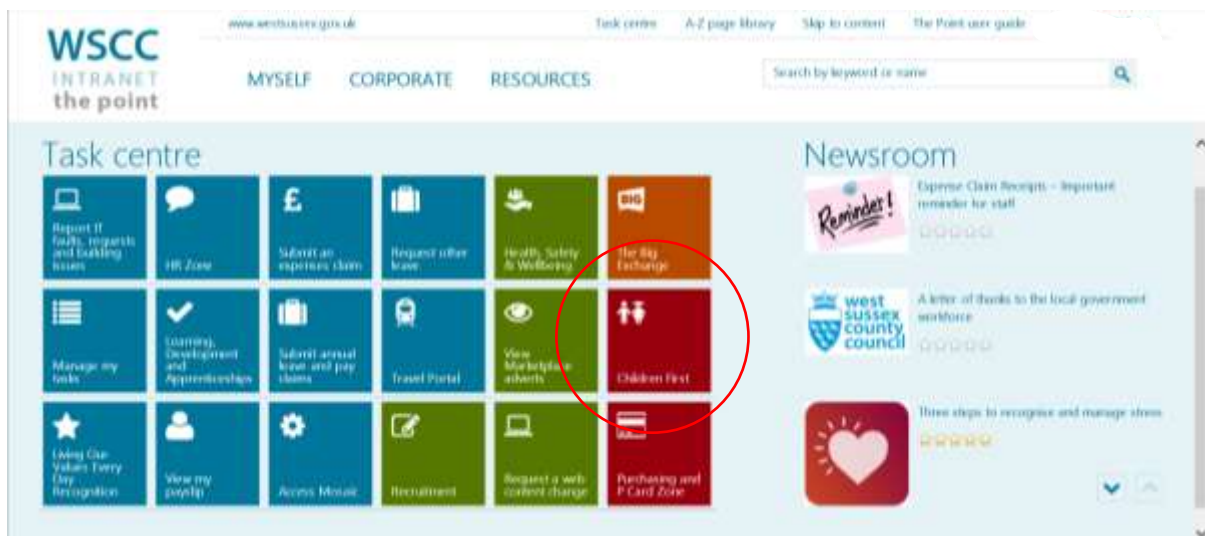
Introduction

Mosaic is the case management system for West Sussex County Council (WSSC). Mosaic is used to record the work you undertake with, and on behalf of, people in need. You will have a unique username and password provided to you, with a website/portal to access Mosaic in your browser.

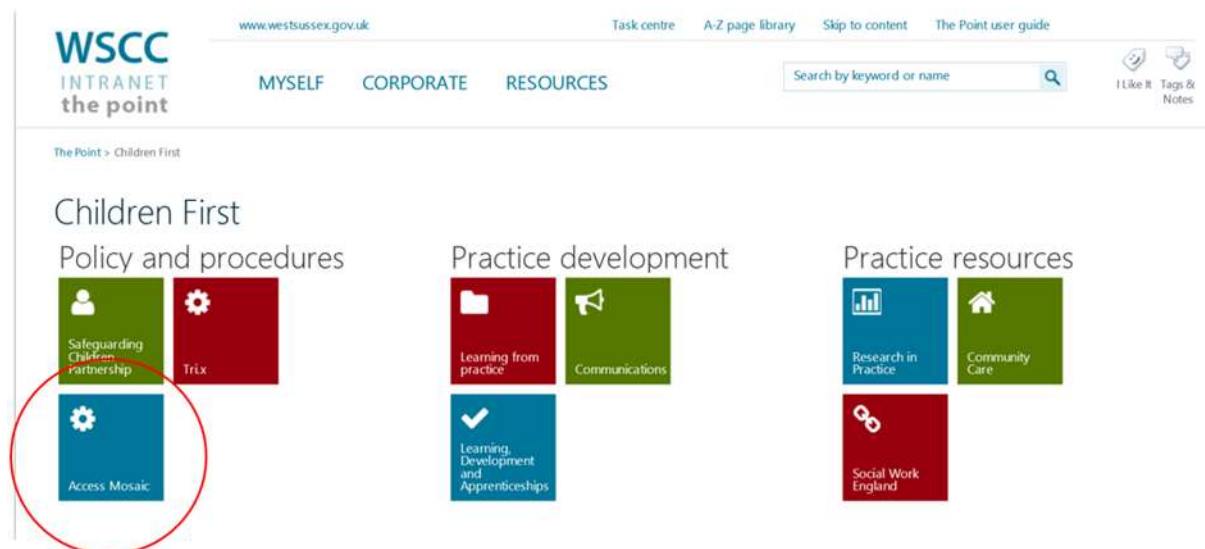
Chapter 1: Logging into Mosaic

Before you can login to Mosaic you will need to have been set up on the system as a worker and been provided with a username and password.

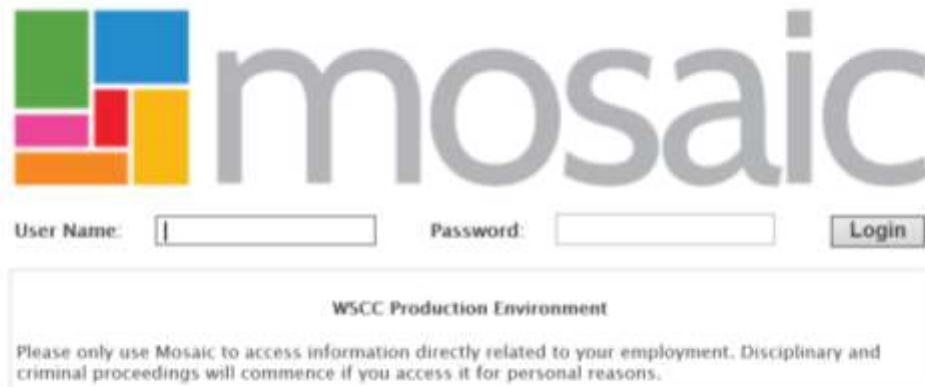
To enter Mosaic first go to The Point and click on the *Children First* tile.



Then click on the Mosaic tile:



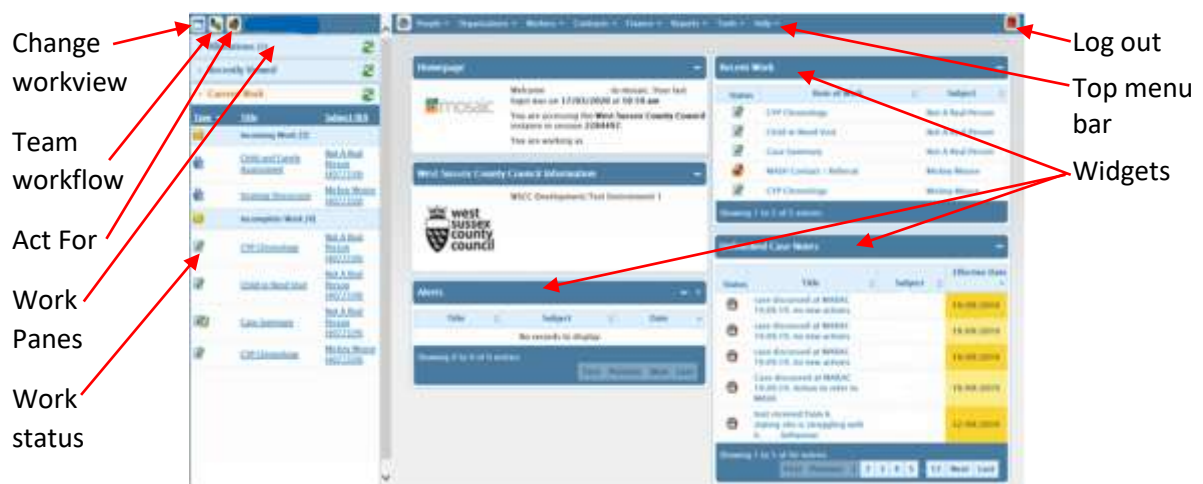
This will take you to the Mosaic login screen:



Enter your User Name and Password and click the *Login* button. The first screen you will see when you enter is your Home Page.

Chapter 2: Navigating Mosaic

Home Page Layout




The left-hand side of the screen shows a compressed version of your *Workview* (see below for *Full Workview*)

The right hand side of the Home page has a set of menus along the top of the screen, and a large area to display information such as: who you are, which organisation you work for, when you last logged on and the version of Mosaic you are currently accessing.

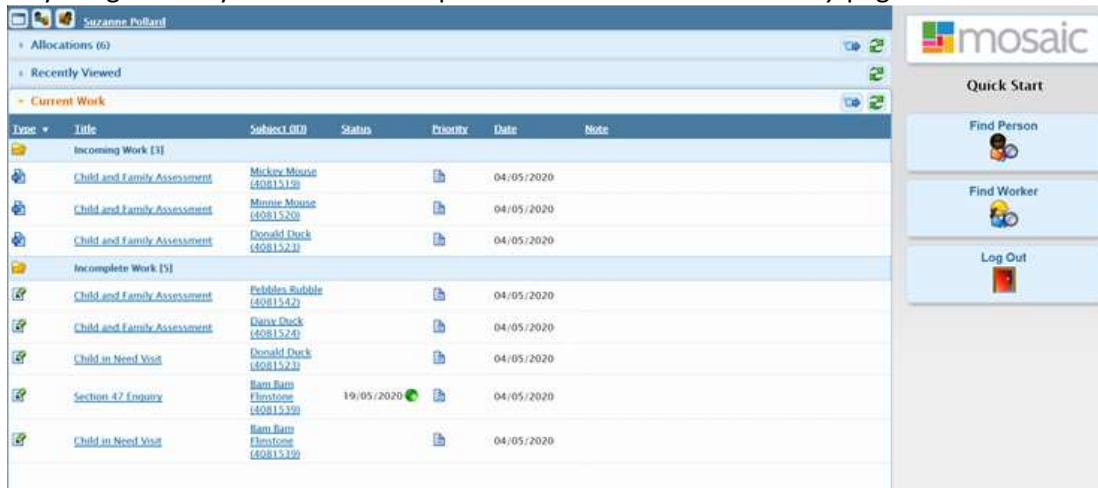
There are also several *widgets* on the home page that provide an overview of your work and offer a quick way to navigate to a piece of work by clicking on it in the widget, for example your recent work, unfinished case notes and case note alerts

Workview

You can change between *Narrow*, *Full* or *Closed* workview by clicking on the icon  and choosing from the options.

In *Narrow Workview* the part of the page to the right is either your *Home* or *Person Summary* page. In *Closed Workview* the browser only shows your home/person summary page.


Full Workview expands to fill the whole screen, from here you can organise your work in different ways or go directly to the individual piece of work or *Person Summary* page.



The screenshot shows the Workview interface for Suzanne Pollard. It features a sidebar on the right with the 'mosaic' logo and 'Quick Start' buttons: 'Find Person', 'Find Worker', and 'Log Out'. The main area displays a list of work items under the 'Current Work' tab. The list is organized into sections: 'Incoming Work [3]', 'Incomplete Work [5]', and 'Section 47 Enquiry'. Each item includes a title, subject ID, status, priority, date, and a note.


Type	Title	Subject ID	Status	Priority	Date	Note
Incoming Work [3]						
Child and Family Assessment	Mickey Mouse	40815120			04/05/2020	
Child and Family Assessment	Minnie Mouse	40815200			04/05/2020	
Child and Family Assessment	Donald Duck	40815231			04/05/2020	
Incomplete Work [5]						
Child and Family Assessment	Pebbles Bubble	40815420			04/05/2020	
Child and Family Assessment	Daisy Duck	40815240			04/05/2020	
Child in Need Visit	Donald Duck	40815231			04/05/2020	
Section 47 Enquiry	Bam Bam Flinstone	40815390	19/05/2020		04/05/2020	
Child in Need Visit	Bam Bam Flinstone	40815390			04/05/2020	

Act For

If you have been granted the relevant permission, you will be able to see who you can act for by clicking this icon .



Work Panes

There are panes for *Allocations*, *Recently Viewed*, *Current Work*. The three panes contain different work items (please note: the slide below shows a *Narrow Workview*)



The screenshot shows the Workview interface with three panes. Red arrows point to each pane with descriptive text:


- Allocations (7)**: Shows work for the people that you have a relationship with.
- Recently Viewed**: Shows work items for the last 10 people you have viewed.
- Current Work**: Shows items that you can complete or assign to another worker to complete.

Click on the pane name to expand it; click on it again to collapse it. Expanding one pane automatically collapses the others. You can update the list by clicking on the icon  for each pane. Clicking on a folder icon  expands the view to show the contents of the folder, for example:



In this case the workview is ordered by title, which groups work together by their step (case closure, case summary etc), you can also order the work by subject or type.











Items where a request has been sent are highlighted in yellow





A number of icons are used in the workview to represent different types of work and you will be able to do different things with each. If you hover the cursor over a work item icon it changes to .

Clicking on this icon takes you to the actions menu which lists the options for each work item. The actions you can take will vary according to your role and permissions.

Work Item Icons

Work Items will have one of the following icons to indicate their status

Icon	Type of Work Item	Options
	Alert	Acknowledge
	Future work	Start work Assign work Assignment history
	Incoming item	Start work Assign work Assignment history Cancel work
	Incomplete item	Resume work Assign work Assignment history
	Incoming notification	Resume work Assign
	Incoming request	resume work Assign
	Request sent. An incomplete item that is waiting for a reply to a request	Resume Work Assign Work Assignment History
	An incomplete item, requests have been sent and some, but not all, have replies	Resume Work Assign Work Assignment History
	A request that has been returned	Resume Work Assign Work Assignment History
	An incomplete step, that has all its requests complete	Resume Work Assign Work Assignment History

	Shows where requests have been sent and they have more than one status, for example completed & awaiting response.	Resume Work Assign Work Assignment History
	Occurrence of a Payment Cycle	Payment Cycle
	A scheduled visit.	visit
	Indicates that this is a privileged access work item.	

Top Menu Bar

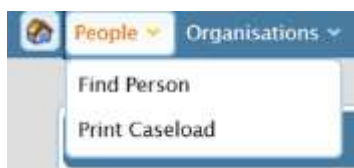


On the left is the home button, clicking on this will take you back to your home screen. There are also 8 menus: People, Organisations, Workers, Contacts, Finance, Reports, Tools, Help. You will mainly use the first three and these are explained in more detail below.

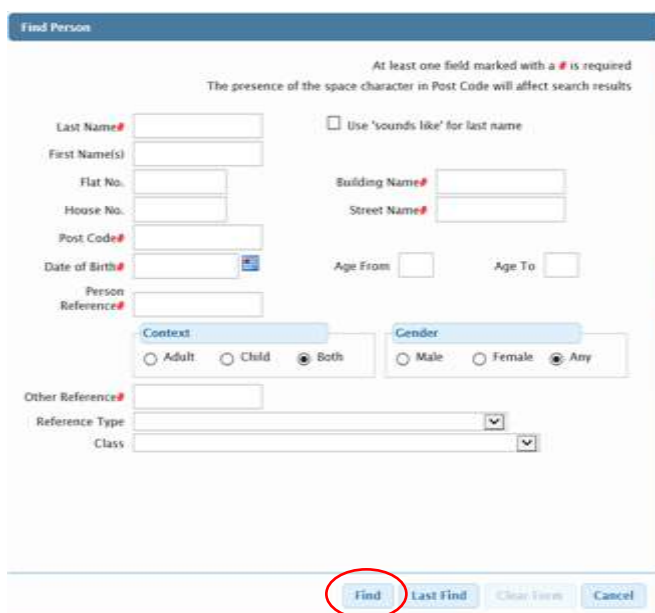
The options you see when opening the menu will depend on the permissions you have, or if acting for another worker the permissions they have.

Chapter 3: Adding a new person to Mosaic

Creating a Mosaic Record



Before creating a new person record on Mosaic, it is important to complete a search to ensure that a record does not already exist. Click> *People > Find Person*:



A window appears with several fields, some of which are labelled with a red hashtag (#). You can use these fields to search for a person using different criteria.

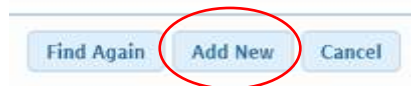
Click> *Find*

Any matches will be listed. If no matches are found it is advised to carry out several searches using different criteria before concluding the person does not exist.

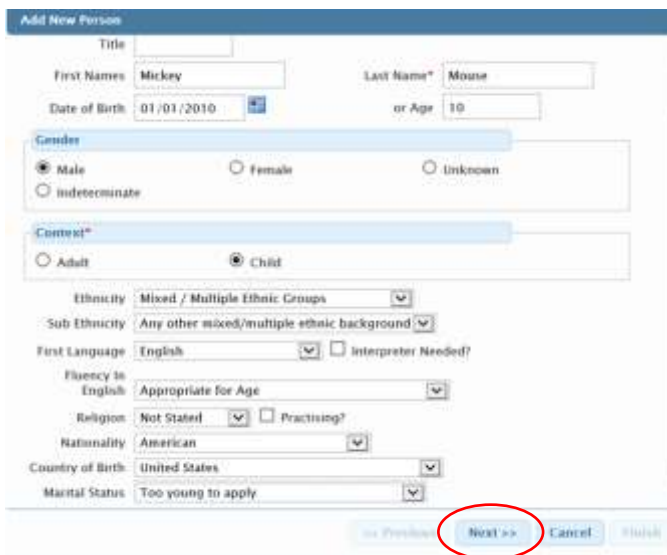


If the search results in no matches, you will need to create a new person:

Click> *Add New*



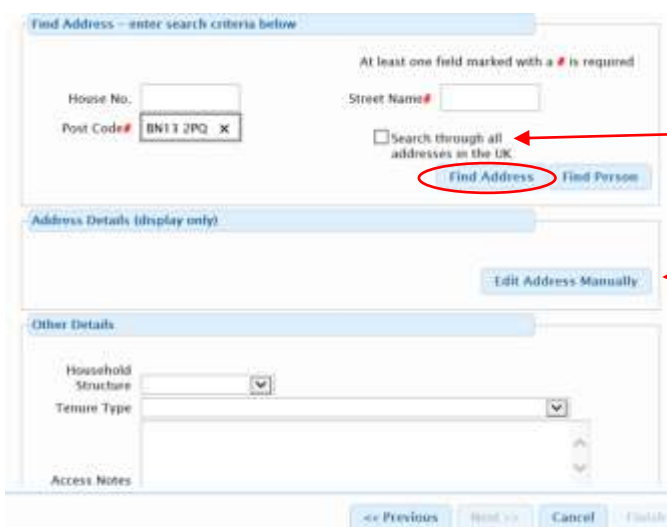
A new window will open, enter all information you have in order to create as accurate a record as possible.



Enter all the basic information you have in order to create as accurate a record as possible

These demographic details will pre-populate future worksteps

Click on *Next>>* to add the address



Enter *Post Code* or *Street Name* and click *Find Address*

Note: If the person lives outside of West Sussex, tick the box marked *search all addresses in the UK*.

If Mosaic cannot find the address it can be manually entered here

Complete *other details* using the drop down lists

From the search result list select the correct address and then click> *Finish*

Chapter 4: Updating a person's demographic information

Person's details



This section explains the various information you can record for a person. The options on the side menu for a person differ according to your role.

The person details menu is found to the left of a person summary page.

To access, Click > Person Details

Basic details

Fields marked with a * are required

Title

First Names

Last Name*

Date of Birth or Age

Gender

☒ Male ☐ Female ☐ Unknown

☐ Indeterminate

Context*

☐ Adult ☒ Child

Ethnicity

Sub Ethnicity

First Language ☐ Interpreter Needed?

Fluency In English

Religion ☐ Practising?

Nationality

Country of Birth

Marital Status

You can make changes to any of the following items and then Click> *Save* to save the changes. Whilst it is not mandatory to populate all these details it is essential for statutory returns that we have complete demographic data and so it is important that all this information is included and correct. Any information provided when the person record was created will be included here.

If you Click> *Cancel* any changes are not saved.

Title: The person's title, such as Dr, Mr, Mrs, Miss etc.

First Name: You can change the person's first names, for example to correct a misspelling.

Last Name: You can change the last name, for example if a person gets married.

Date of Birth: Click on the date field to select the person's date of birth

or **Age:** If the date of birth is unknown you can enter an approximate age.

Gender: Select the appropriate category (note: this data must be consistent with NHS records)

Context: This is set automatically based on the person's age and date of birth.

Ethnicity: Select an appropriate ethnicity from the list of available choices, such as White, Mixed, Asian etc.

Sub Ethnicity: Select an appropriate sub division of the person's Ethnicity.

First Language: Select the person's first language. If this is not English you can also click the *Interpreter Needed* tick box if appropriate.

Fluency in English: Select a fluency from the list, this also allows you to specify that the person communicates with sign language.

Religion: Select a religion from those listed and note if the person is Practising.


Nationality: Select the person's nationality.

Country of Birth: Select the person's country of birth.

Marital Status: Select from the list of statuses.

Addresses

If the person has moved from the address listed on Mosaic (i.e. they no longer live here) you must follow the correct procedure to ensure that multiple current addresses are not listed:

Click on the removals van icon  which is found on the right of the address. This will take you to the *Find Address* page, complete the fields as before.

Click> *Save*

The new address will now be visible on the *Person Summary Page*.

Please note: the *Display Address* may not be the same as the *Primary Address*. As it is the *Primary Address* where correspondence is sent to, it is essential that you check this is current and correct to prevent any data breaches.

If you wish to add another address to the person's record e.g. another family member's home where the child stays or a foster placement

Click> *Add*

and complete the fields as before, please ensure that you update whether this new address is the *Display Address* and/or *Primary Address* (i.e. where correspondence will be sent to).

Telephone numbers

you can add or update telephone numbers here.

Click> *Add*



The screenshot shows a form with four fields: 'Number *' with a text input containing 'mum: 0110 111111', 'Type *' with a dropdown menu, 'From' with a date input showing '17/03/2020' and a calendar icon, and 'To' with an empty date input and a calendar icon.

There are 2 mandatory fields, the number and the type. Type the number + who it belongs to in the first box, then choose the type from the drop down list.

To amend (or delete) an existing number click on the  icon next to the relevant number

If the number is no longer in use, enter the date when it ended to ensure it is no longer shown on the person summary page.

Click> *Save*

You can enter multiple phone numbers on a person's summary page however it is essential that the information entered in this screen is correct and up to date as errors to phone numbers can cause

significant delay to contacting families. If you become aware that a phone number listed on the screen is no longer in use it is your responsibility to amend the details, so they are always up to date.

Email Address, Preferred Communication Method, Classes, Date of Death can all be amended here.

Other Names

The name entered on the main *basic details* page must be the name on the person's birth certificate. If the person is known by or chooses to be addressed by a different name then this should be recorded here, for example a child may be known as 'Charlie' but their birth certificate is recorded as 'Charles' so this is the name of the person record.

GP

If you have a named GP for this person you can enter their details here using the search function. If you only have the name of the doctor's surgery, you can enter this using the *Organisation Relationships* button.

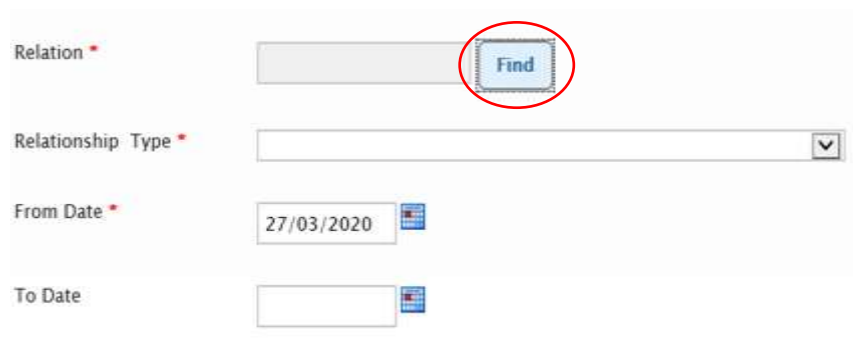
Organisation Relationships

add organisations which are involved with the person here e.g. schools, nursery, doctor's surgery, substance misuse etc using the *find* function. Add the type of relationship from the drop down list.

Personal relationships

this function is used to create links between other persons' records listed on mosaic, for the type of relationship to be recorded as well as other attributes such as parental responsibility or guardianship. *Personal Relationships* are also important in creating the person's genogram.

Click>*Personal Relationship*>Add



Relation *

Relationship Type *

From Date *

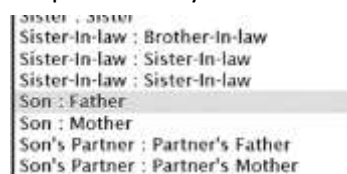
To Date

Click>*Find*

If the related person is not already listed on Mosaic you will need to create a new person record using the previously explained process

Click> Relationship Type

This will open up a drop down list of possible relationship types. Choose the type of relationship from the original person's perspective, for example Bart Simpson is the son of Homer Simpson, so in the drop down list you choose Son: Father



Use the date picker to establish when this relationship began, in this case it would be Bart's date of birth.

The screen will then display this relationship in context:




If these sentences are not correct go back to the relationship type drop down list and chooses a different type.

If this person has parental responsibility for the other person in the relationship, tick the *...has parental responsibility* box.

You can also select one or more options from the roles beneath to further define the relationship.

Click > Save

To make changes to the relationship click the  icon for the relevant relationship.

Worker relationships

This function defines relationships between the person and professionals. It is used to identify the Allocated Worker and/or any other professional such as teachers, health visitors, youth workers, substance misuse workers etc. It is the responsibility of workers to keep these records accurate and up to date.

Please Note: If you are creating a relationship between the child/young person and the person who is the named worker for the case, the category of *Allocated Worker* must be used, DO NOT select *Social Worker* as only *Allocated Worker* will connect worker and child on Mosaic.

To add a worker relationship

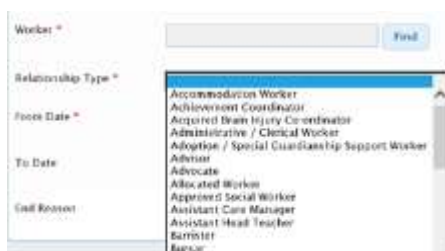
Click> Add>Find

Search for the worker, if not found you will need to create a new worker record.


Click> Relationship Type

A drop down list will appear listing different professional relationships, choose the correct one, select the date this relationship started

Click> Save



If the professional is no longer working with this person, their relationship must be recorded as *Ended*.

Click> Person Details> Worker Relationships and the  icon next to the worker's name.

Enter the *To Date* and choose an *End Reason* from the drop-down list.

Click> Save

Employment Status

can be amended here by choosing the appropriate option from the dropdown list.

References

It is essential that all children and young people have their NHS numbers recorded on their file, this can be added to the records here.

Click > *Person Details* > *References* > *Add*

Select the reference type from the drop down list and add the reference number in the box below.

Click > *Save*

Other important reference numbers (where applicable) include Impulse ID, Unique pupil number and Holistix number.

Information recorded here is displayed on a person's summary page in the *References* widget.

Service User Groups

Recording a child/young person's service user group is a mandatory requirement.

To add a person's Service User Group

Click> *Person Details* > *Service User Groups* this opens the following window



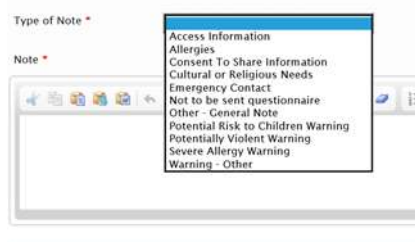
Click > *Group* to reveal a drop down menu.

Select the appropriate *Group* and *Sub-Group* and Click > *Add* > *Save*

Notes

Warnings and notes relating to the child/young person can be added here

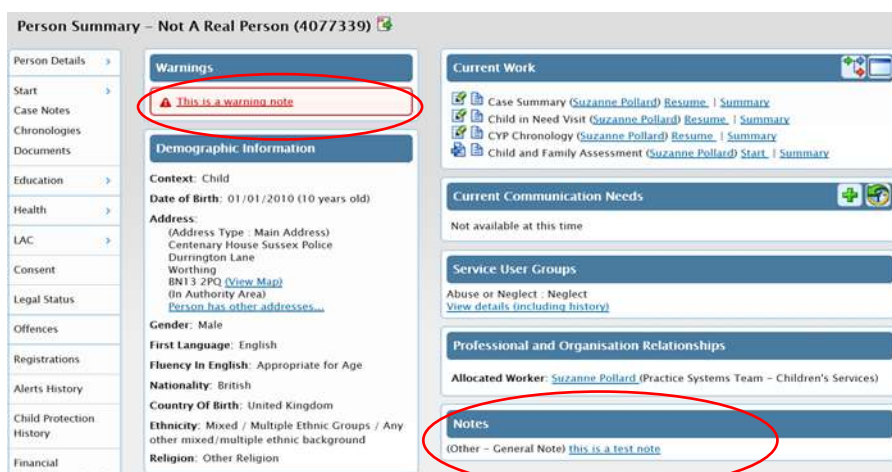
Click> *Notes*> *Add*



Click> *Type of Note*

A drop-down list will appear, choose one option

Write note in the free text box below.



The note will appear in different areas of the person summary page depending on the type of note you selected, for example a warning note will appear at the top of the page in **red letters**; whereas a general note will appear on the bottom of the right side of the screen in **blue**

Person Summary – Not A Real Person (4077339)

Person Details

Start

Case Notes

Chronologies

Documents

Education

Health

LAC

Consent

Legal Status

Offences

Registrations

Alerts History

Child Protection History

Financial

Warnings

This is a warning note

Demographic Information

Context: Child

Date of Birth: 01/01/2010 (10 years old)

Address:

(Address Type : Main Address)

Centenary House Sussex Police

Durrington Lane

Worthing

BN13 2PQ ([View Map](#))

(In Authority Area)

[Person has other addresses...](#)

Gender: Male

First Language: English

Fluency In English: Appropriate for Age

Nationality: British

Country Of Birth: United Kingdom

Ethnicity: Mixed / Multiple Ethnic Groups / Any other mixed/multiple ethnic background

Religion: Other Religion

Current Work

Case Summary ([Guzanne Pollard](#)) [Resume](#) | [Summary](#)

Child in Need Visit ([Guzanne Pollard](#)) [Resume](#) | [Summary](#)

CYP Chronology ([Guzanne Pollard](#)) [Resume](#) | [Summary](#)

Child and Family Assessment ([Guzanne Pollard](#)) [Start](#) | [Summary](#)

Current Communication Needs

Not available at this time

Service User Groups

Abuse or Neglect : Neglect

[View details \(including history\)](#)

Professional and Organisation Relationships

Allocated Worker: [Suzanne Pollard](#) (Practice Systems Team – Children's Services)

Notes

(Other – General Note) [this is a test note](#)

- Widgets: these give an overview of the information stored in the file. Some Widgets can be opened to either amend information (such as current communication needs) or to reveal other information (such as work history- see below)

Start




Start one of the following for Wickey Moose (402795319)

- Age-Phase Transfer
- Case Add
- Case File Add
- Case Summary
- CTS Resource Panel Request
- Child in Need Visit
- Child Protection Visit
- Child SDC Review
- Conviction
- CP-1 Non-Charging
- CP-1 Concurrence
- Disagreement Resolution Services
- Dispute Resolution Process - Stage 1
- Dispute Resolution Process - Stage 2
- Dispute Resolution Process - Stage 3
- Dispute Resolution Process - Stage 4
- Dispute Resolution Process - Stage 5
- Draft Accused CCR
- DYARM Pathway 1
- DYARM Pathway 2
- First PEF Meeting
- Health and Safety Review
- Mental Health Assessment / Adoption Medical
- RDC Contact CYP
- UCR Add
- MAGN Contact / Referral
- MPMR Assessment Request and Guidance

Cancel

Click > *Cancel* to close this box without starting any new work.

This opens the *Case Note Summary Page* where all previous case notes are recorded in date order.

Cases that have not been finished before the 'timed out' period has elapsed will have this icon  next to them. On the right of the case note are two further icons:  which allows you to append a timed out or finished case note; and  which copies the case note to other persons records.



The screenshot shows a table with columns: Title, Type, Contact Date, Created By, and Team. The first row contains: telephone call to parents, Telephone Contact, 16/04/2020, Suzanne Pollard, and Practice Systems Team - Children's Services. Below the table are buttons: Print Multiple Case Notes, Find Case Note, Show Related People, View, Add, and OK.

The summary page has buttons along the bottom that allows you to:

Print multiple case notes

Find Case note

Show related people

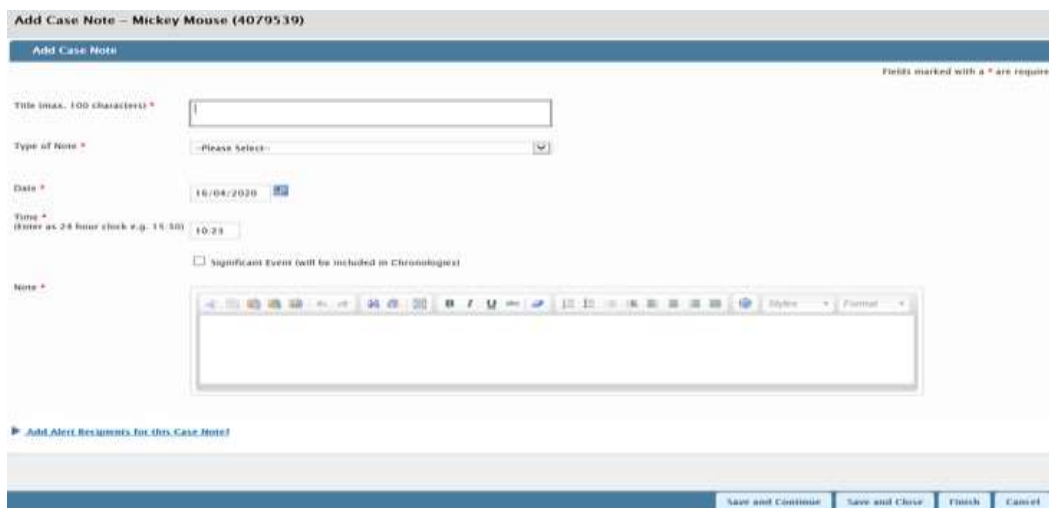
View

Add

Clicking **OK** closes the page and returns to the person summary page

Adding a case note

Click> **Add**



The screenshot shows the 'Add Case Note' form for Mickey Mouse (4079539). Fields include: Title (max. 100 characters), Type of Note (dropdown), Date (16/04/2020), Time (10:23), and a checkbox for 'Significant Event (will be included in Chronologist)'. A rich text editor is provided for the Note. At the bottom are buttons: Save and Continue, Save and Close, Finish, and Cancel.

This opens a new page that has the following fields, some of which are mandatory:

Title:

The title will be displayed in the Case Note Summary Page. This should be a brief text to hint at the details contained within the note. It is advised to keep the title short and simple and to avoid abbreviations.

Type of Note:

Select from the drop down list

Date:

Select the date the event took place

Time:

Enter the time the event took place

Significant Event:

tick if this is a significant event. It will make the note appear in bold in the summary page.

Note:

Type the case note in this box. Check your text carefully as you will not be able to edit it once the case note is finished.

The buttons at the bottom of the page:

Save and Continue:

Saves your work and allows you to continue

Save and Close:

Saves your work and closes the page. You can reopen the case note to edit until the timed out period elapses.

Finish:

Save and finish the case note. You will not be able to change the case note once finished however you will be able to append it.

Cancel:

Close the case note without saving any of the changes


You can alert one or more workers that this case note has been created, the alert will appear in their workview so they can navigate quickly to it, you can also request they are alerted by email.

Click> *Add Alert Recipients for This Case Note*

Editing a case note

If the case note has not been finished or timed out you can click the  icon to edit it.

Appending a case note

If a case note has been finished or timed out you are able to append it by clicking the  icon. You will see the original note, but you will not be able to edit it. A new text box appears below for you to enter any further information. You are also able to change whether this is a significant event or change alerts.

Searching for case notes

Over the course of our involvement with a person a lot of case notes can get recorded. To find a specific note

Click> *Find Case Note* **add arrows**



Keyword(s) in title: Search for specific words that are included in the Case Note Title.

Case Note Date Range: Search for case notes entered within a specific date range.

Type: Search for case notes restricted to specific type.

Entered By: Search for case notes entered by the selected worker.

Include Case Notes of Related People: This allows you to include related people's case notes in the search

Click> *Find* to start the search, or *Cancel* to close the *Find* page.


Show Related People

When viewing the list of case notes for one person you can click on *Show Related People* to include case notes written for relations of the original person. If the relations are shown the button changes to *Hide Related People*, so you can remove them from the list:

Copying case notes




You can copy case notes to related people or unrelated co-inhabitants.

Click the  icon, to copy the case note(s) and related people are listed

You can also copy the case note to unrelated people who live at the same address by clicking the *Show Unrelated Coinhabitants* button.

To copy the case note, select the relevant people Click> *Copy*.

The copied case note is identified as a copy on the recipient person's list of case notes.

COPY - [Call from School](#) Telephone Contact 08/04/2020 Suzanne Pollard Practice Systems Team - Children's Services 

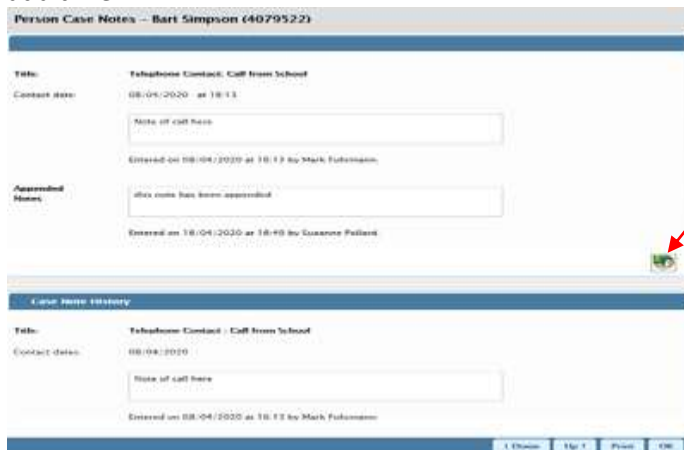
Please Note: Case notes that are timed out cannot be copied; they must first be finished.


Viewing case notes

To view individual case notes go to the case note summary screen,

Click >*View*

This displays the most recent case note. Use the *Up* and *Down* buttons to move through the list one at a time.



If a case note has a history it has the  icon in the bottom right corner.

Click it to display the history of that case note

Printing Case Notes

You can print the displayed case note by clicking the *Print* button

Select Case Notes for Printing – Mickey Mouse (4079539)

Tick the case notes you wish to select for printing and click 'Print' at the bottom of the page.

<input type="checkbox"/> Select/Deselect All Case Notes	Title	Type	Contact Date	Created By	Team
<input checked="" type="checkbox"/>	Telephone call from GP	Telephone Contact	16/04/2020	Suzanne Pollard	Practice Systems Team – Children's Services
<input type="checkbox"/>	Case summary	Case Summary	16/04/2020	Suzanne Pollard	Practice Systems Team – Children's Services
<input checked="" type="checkbox"/>	Telephone call to parents	Telephone Contact	16/04/2020	Suzanne Pollard	Practice Systems Team – Children's Services
<input type="checkbox"/>	Select/Deselect All Case Notes				

Preview Selected Print Cancel

You can print one or more case notes by going to the case note summary page, Click > *Print Multiple Case Notes*

Check the notes you want to print (it is possible to *Select/Deselect All Case Notes*)
Click> *Print*

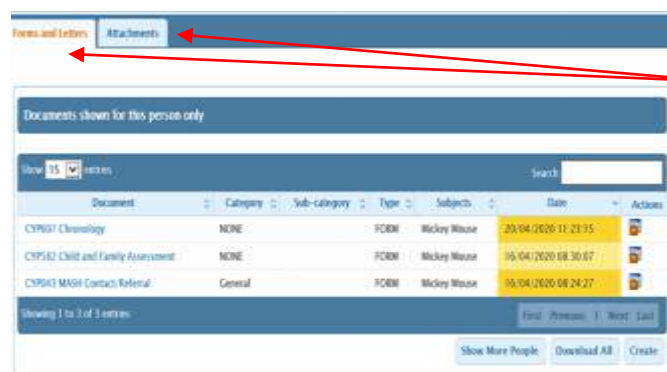
Chronologies

This function is not currently active in Mosaic however historic saved and finished Chronologies can be viewed here. Note: Current Chronologies can be found by viewing the person's work history.

Documents

Documents can be viewed and uploaded here

Click > *Documents*



There are two tabs: Forms and Letters & Attachments.

Items are listed in date order (most recent at the top)

You can change the order of the list by clicking on the column headings

Forms and Letters shows a history of all finished and saved forms and letters, whether created as part of a work item, or outside workflow.

You can click on a document's name to display a read-only view of the document.

In the *Actions* column there are icons that indicate the actions you can take; these vary according to the type of document:



Documents created as part of a work item. Opens the step summary for the item, where you can for example, resume the work.



Documents created for a group. Opens the group summary for the item, where you can for example, resume the work.



Documents created outside workflow (from the *Create* button on this tab), clicking this icon opens the document for editing. If you Finish the document, the icon will no longer be displayed.

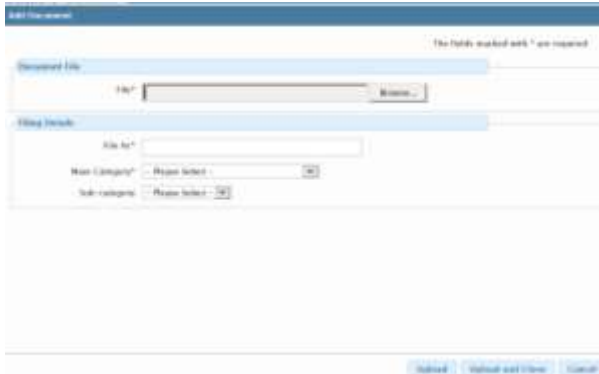


Allows you to delete a document created outside workflow.

You can include documents from people that this person has a personal relationship with by clicking the *Show More People* box. This will open a new dialogue box, select one or more people from the list

then Click > *Show*. (To go back to displaying only this person's documents Click > *Reset* located at the top of the screen.

Attachments shows related documents that have been uploaded, such as Word documents, or photos. To upload an item to the person's file Click > *Upload*



Click > *Browse*

Select document you wish to upload from your files.

Click > *File As*

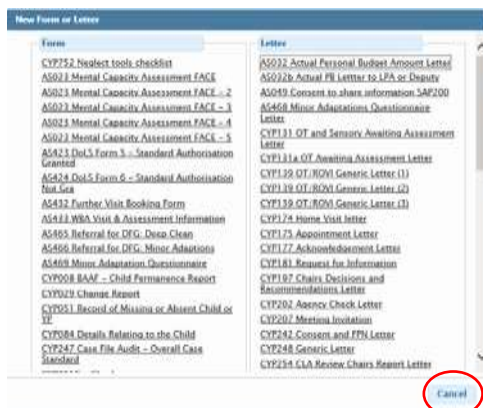
Select the category of the document from the list. Select a sub category if appropriate.

Click > *Upload* if you wish to add another document or *Upload and Close* if you have finished.

To create a new form or letter



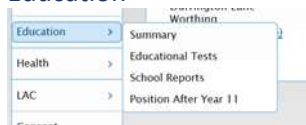
Click > *Create*



Select an item from the list.

Click > *Cancel* to close the box without making a selection.

Education



Information about the child or young person's education is stored here. This includes a summary page that pulls through demographic information.

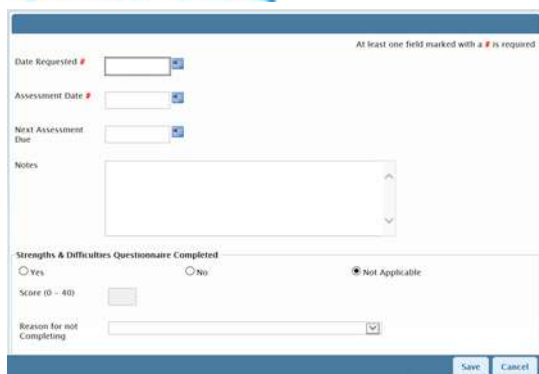
Health



Information about the child or young person's health is stored here.

Details of health assessments can be added and viewed here.

In *Health Assessments* you can record a person's health assessment and highlight when the next one is due. Click > *Health* > *Health Assessment* > *Add*



Date Requested: Use the date picker to specify the date that an assessment is to take place.

Assessment Date: Use the date picker to specify the date an assessment actually took place.

Next Assessment Due: Use the date picker to specify when the next assessment should take place.

Notes: Option to add any notes relevant to the assessment.

Strengths & Difficulties Questionnaire Completed: Complete this section if applicable. Select either *Yes*, *No* or *Not Applicable* depending on whether or not the questionnaire was completed. If you select *Yes*, enter the score for the questionnaire. If you select *No*, pick a Reason for Not Completing.

LAC



Information about the child or young person's CLA placements and their legal status is stored here

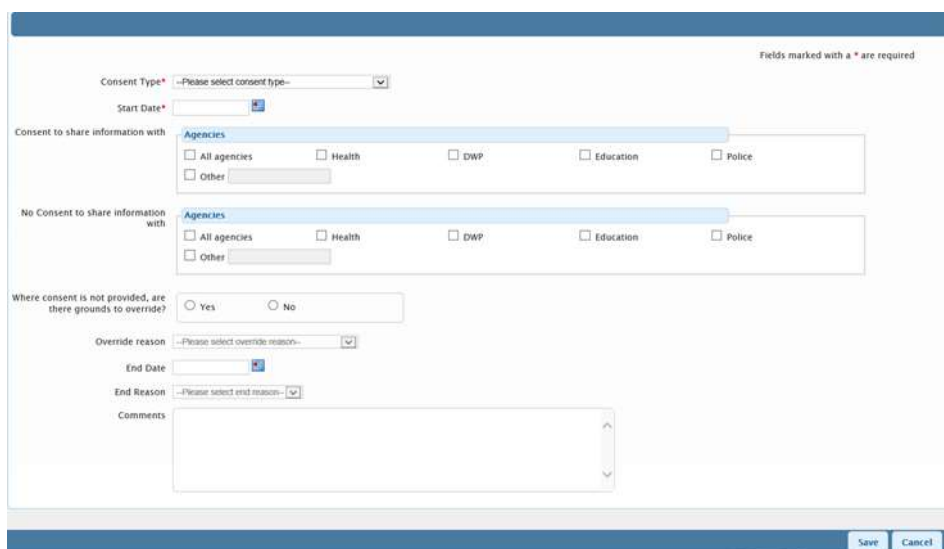
Consent



Information about consent to share information can be stored here.

It is important to record when consent is given and when it is withdrawn

Click > *Consent* > *Add*



Consent Type: Select from the list the type of consent to record. For example, Consent received verbally from parent or guardian.

Start Date: Select the date that consent was given

Consent to share information with Agencies: Tick the agencies the person consents to share information with.

No Consent to share information with Agencies: Tick the agencies the person does not consent to share information with.

Where consent is not provided, are there grounds to override?: Tick *Yes* if there are grounds to override no consent.

Override reason: If *Yes* was ticked in the previous question, select the relevant override reason from the drop down list.

End Date: When editing a consent you can end it, by specifying the end date.

End Reason: Select a reason that consent has ended from the drop down list.

Comment: Optional comments about the consent.

Click> *Save* to save the consent details.



The consent details are displayed on the *Consent Summary* and in a widget on the *Person Summary* page

Legal Status



The legal status of the child or young person can be recorded here.

Click> *Legal Status* > *Add*

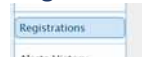
Select the date the legal status started from, select a category from the drop down list. Record any notes if appropriate and Click> *Save*. The details are recorded in the *Legal Status* summary page and in a widget on the *Person Summary* page.

Offences



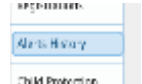
Information about a person's offences can be recorded here

Registrations



You can record information such as a *child disability* here.

Alert History



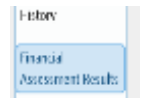
Alerts created in different parts of mosaic are recorded here, for example *case note alerts*

Child Protection History



A summary of the person's child protection history is recorded here.

Financial Assessment Results



Financial assessments can be added or amended here.

Current Communication Needs

This widget is located on the right of a person's page and is used to record any communication needs.



To add information, click here.

To review the history click here

A new box will open





Select a date from the date picker

Select a category from the drop down list

Select a sub category from the list

Select an end date in appropriate from the date picker.

Click *Add and Close* to finish

The information will now be displayed within the widget on the person's summary page; this can be amended or deleted by clicking on these icons   displayed next to the record.

Chapter 6 Workflows and Worksteps

Worksteps

A workstep is a single piece of work used to capture case recording, for example *Child and Family Assessment* and *Adoption Support Plan* etc. The process is typically made up of three component parts/stages: The *Form (document)*, *Request (manager's approval)*, and the *Actions Taken (next actions)*.

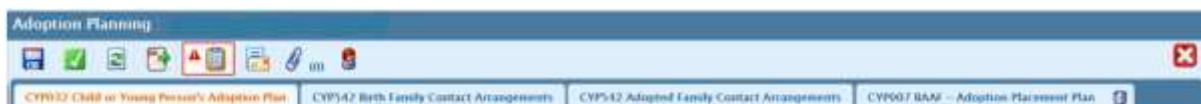
Workstep component parts


Document/Forms

Worksteps will often contain form(s) on which workers will record the detail of the work.

Forms can be *Mandatory* or *Optional*

You could have multiple forms within a step but there is always ONE primary form. For example in the Adoption Planning workstep there are four forms which need to be completed and these are displayed as separate TABS:



Optional forms and letters associated with the form can be found by clicking on this icon  in the top menu bar. This will open a list of forms and letters that can be completed as part of the step.

Requests

A channel that gives another worker access to contribute to an ongoing workstep. This can be mandatory or optional for example, A manager's sign off or authorisation

Next Actions

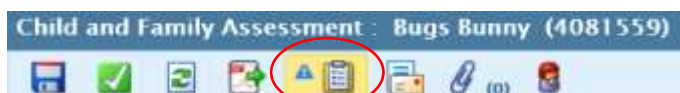
This is a record of the intended decision taken based on the findings or information available so far

When you start a workstep, by default it opens the primary *Form* which will have a number of sections. For example, this Form has 9 sections. You can click on the section title to move to it

Each section contains a series of questions some of which could be mandatory (*these are usually marked by a red asterisk **). You will not be able to finish the Workstep until the mandatory fields have been completed

Detailed guidance about how to complete different forms can be found in Tri.X

Often a completed form will require a manager signoff; this is achieved through the *Request* process which can be activated via the Yellow Clipboard icon at the top of the workstep screen:



A list of different requests will appear.

Click the request you wish to send

A new field will appear asking for the request to be passed to the relevant worker.

Either enter the name of the worker using the *Find* option or select from the drop down list.

The final stage of a workstep is recording what needs to happen next – this is captured in the last section of the primary form also known as '*Actions Taken*'. In most cases this action will lead to the next workstep. The only exceptions are terminating worksteps; these are actions that lead to a dead-end, for example 'Close Case'

Go to *Next Actions* section, Click > *Add*

A new box opens,

Click > *Please Select* to reveal a drop down pick list.

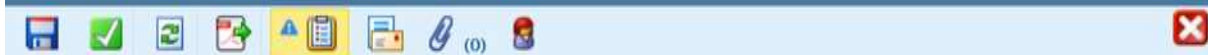
Select the correct next action

This can be assigned either to a named worker or team

Click either *Add* if more actions are required or *Add and Close* to finish.

Workstep layout and control

The toolbar at the top of every form allows you to manage the workflow item:



The icons in the tool bar may differ according to the tasks or forms associated with the item.

The following icons may be present:



This saves the work item so it can be resumed at a later date



Once everything is completed within the form, the item is finished, and this moves onto the next action in the workflow. If all mandatory steps have not been completed, you will not be able to finish.



Refresh the current form



This creates a PDF of the item, which can be used to print



This icon indicates that there are requests associated with this form. The blue triangle shows that at least one of the requests must be completed before the work can be saved.

If you attempt to save without completing the request the validation will change the triangle colour to red.



Clicking on this icon will reveal the optional letters and forms associated with this item



This icon shows how many attachments have been uploaded. Click on it to display a list of the attachments.



You are able to copy from another person's form by clicking on this icon.



Clicking on this icon switches the screen back to the Person Summary Window.





You will only see this icon if there have been changes made to the structure of the form and it needs updating to the newest version

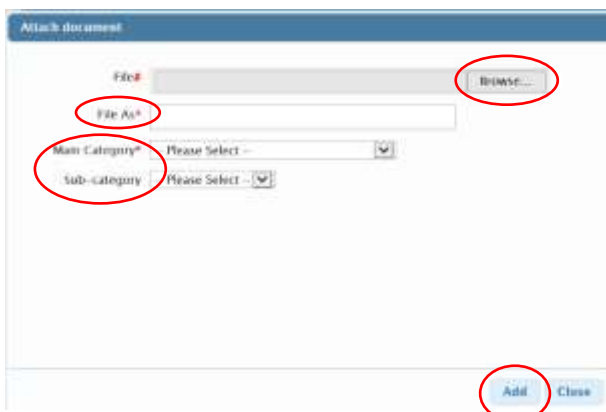


This closes the work item. You will see a prompt to *Save* or *Cancel* any changes you have made since last saving

Uploading an Attachment to a form

To upload an attachment to a form Click on the  icon located in the tool menu bar.

Click on this icon:  Attach a document and a new box will appear



You can browse to find the file and specify a name for the attachment in the File As field.

You can also select a category and subcategory (such as Assessment and Health)

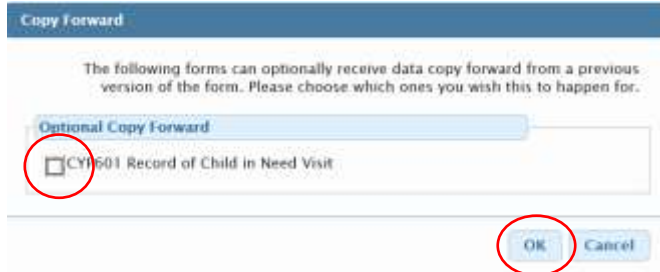
Click Add to upload the attachment to the form.

You can click *Delete* to remove the attachment (provided you have the appropriate permissions), or

Edit to change the file name, category or subcategory.

Copy Forward

Some forms have the ability to copy information from a previously finished form for the person. Where this is possible a dialogue box will appear when the form is started.



The following forms can optionally receive data copy forward from a previous version of the form. Please choose which ones you wish this to happen for.

Optional Copy Forward


☒ CY0501 Record of Child in Need Visit

OK Cancel

If you want to copy forward the data, check the box next to the form name. Click > OK

Check the information that has been copied carefully to be sure it is what you expected.

Copying Forms

If you have been given the relevant permission, you can copy an item from a relative, coinhabitant or another person. On the top menu bar of the form Click the  icon. A new box will appear:



Copy

At least one field marked with a # is required

Relations and Coinhabitants# Please Select Mickey Mouse

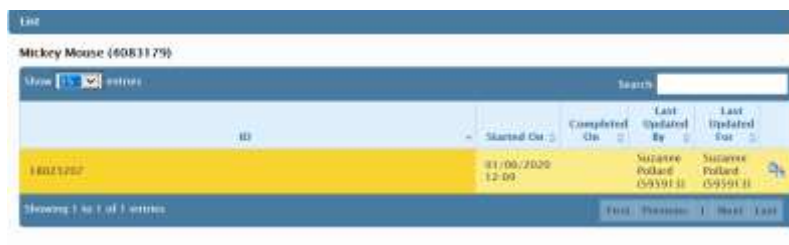
Find Person# Find

Cancel

Click > *Please Select*

Select the relevant relation, or coinhabitant from the drop down list or Click > *Find* to search for the person to copy the item from.

If you select a person from the list of Relations and Coinhabitants a new list of items available for copying belonging to that person are displayed.



List

Mickey Mouse (6083379)

Show 15 entries


ID	Started On	Completed On	Last Updated By	Last Updated On
18021252	21/09/2020 12:00		Suzanne Pollard (59391)	Suzanne Pollard (59391)

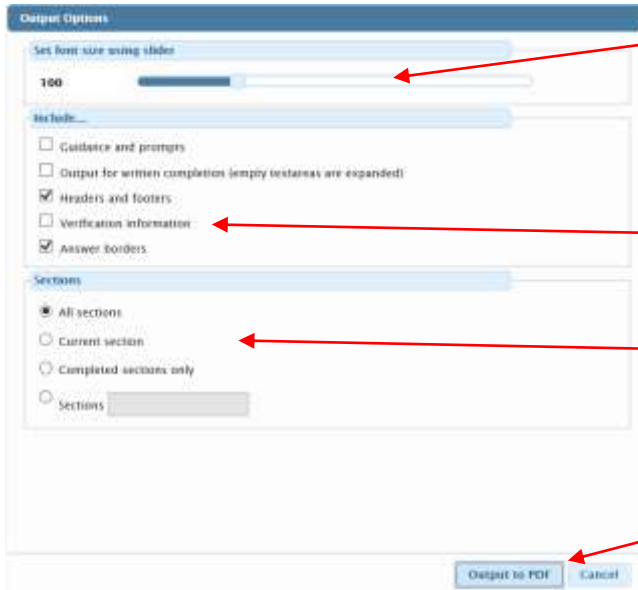
Showing 1 of 1 entries

First Previous 1 Next Last

Select the correct form to copy from and Click the copy icon on the right.

Printing Forms

To print a form Click on the print Icon located on the top menu bar  This will open a new window. This contains additional options for printing.



Change the font size here

Ticking/unticking these boxes changes what fields are included in the printed document. For example if you want to include a date stamp in the form click *Verification Information*

You are able to select to print all or only certain sections of the form by ticking/unticking these boxes.

Click here to change to a PDF in preparation for printing.

Workflow

A *Workflow* is a series of required actions that are related to an area of children's social care, for example Child In Need, Child Protection, Child Looked After etc. They are managed as a sequence of *Worksteps* that need to be completed in order to progress to the case through the system.

There are many workflows within the Children's Social Care Service. Each workflow is associated with a particular process/area of child protection/safeguarding for example Contact Assessment and Intervention or Children Looked After.

Starting a workflow from a person summary page



You can start a new item of work, or workflow from the Summary page of the relevant person.

Click> *Start*

This reveals two options,

- *Contact and Referral*,
- *New...*, clicking on this opens a list of workflow items that you can start.



Scroll through the list to find the right item and Click to start.

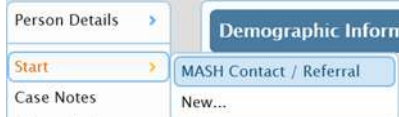
Only steps that can be started ad hoc can be found here.

The list of workflow items will differ depending on your role.

Completing a Typical Workflow

This section will give an example of how to complete a typical Contact Referral and Assessment workflow through to closure. This is to illustrate how each workstep generates a next action. Whilst all workflows have their differing steps and forms they all follow this basic pattern.

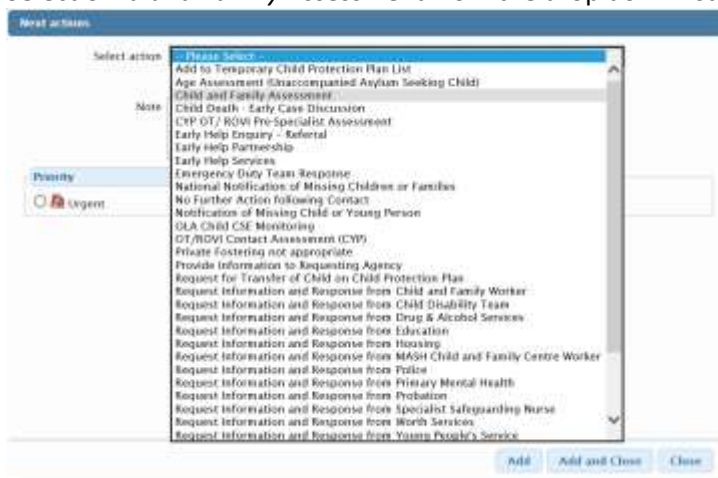
- Find the person's record (if new, create one) and Click> *Start* in the side menu on the Person Summary Page.
- Select *MASH Contact/Referral*, this will open the form.



- Enter all relevant information and complete all mandatory questions/action (highlighted with a red *)
- Go to the last section: *Actions Taken*




- Click > *Add* a new box will appear
- Select *Child and Family Assessment* from the drop down list.



- Then choose who to assign the work to using these boxes:

Pass to worker

- Click on the Request icon in the top menu 
- Select the request type and then select the reviewing manager to send it to, using the *Find* button

The request to review the information and confirm outcome will now appear in that person's incoming work folder.

Once this has been completed and the Workstep finished, it will move into the person's Work History and the form can be read in Documents

- The next Workstep (*Child and Family Assessment*) will appear in the allocated workers *Current Work* pane and on the person's summary page

Current Work		
Type	Title	Subject (ID)
Incoming Work [1]		
	Child and Family Assessment	Mickey Mouse (4082919)

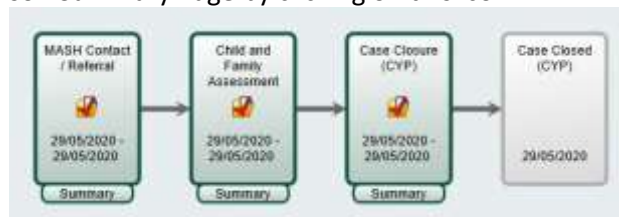
Current Work	
Child and Family Assessment (Suzanne Pollard)	Start Summary


- The allocated worker will now complete the *Child and Family Assessment*, ensuring the Mandatory fields have been completed.
- If there is to be no further action following assessment, *Close Case* should be selected from the next actions dropdown list.
- The completed assessment should be sent to a manager to be reviewed and to confirm the outcome. They will then finish the Workstep and a *Case Closure* Workstep will now appear in the worker's incoming work folder and on the person's summary page
- Follow the same process as before: complete the form, select Case Closure from the drop down list in the next action section, send request to a manager. The manager can then finish the step and the case is closed to children's social care.


This workflow is visually represented on the person's caseload. It can be found in the *Current Work*

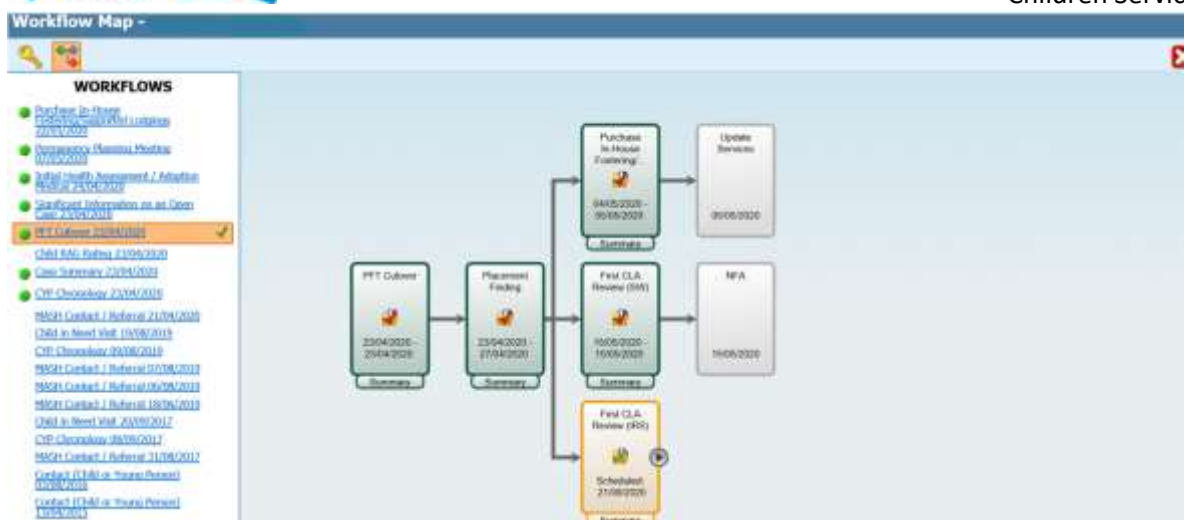


Widget of a Person Summary Page by clicking on this icon



Clicking on the  icon in the top menu bar reveals map's key. The key explains the colour coding that is used to indicate the status of different work items on the workflow map. If there are several workflows in progress for this person, you can select the one you


wish to view by clicking this icon . The workflows still in progress have a green dot to the left. It is possible to move the workflow map by clicking and dragging it around the screen.




From this page it is also possible to read each form in the Workflow by clicking on the link 'Summary' located under each Workstep.

Clicking on the  icon expands and collapses the workflow to show next actions.

Team Workflow

If you have been granted permission, you will be able to see your team's workflow by clicking this icon .

Below is a full *Workview*. To change the screen to a *Narrow Workview* Click>  and choose from the options

Assigned to Team	Incomplete	Incoming	Future
Assigned to Team	0	0	0
Suzanne Pollard	6	10	3
John Rotherham	0	0	0
Debra Jermolova	0	1	0

Team work is divided into two sections:

Team Summary and *Current Work*.

Click on the title of the section to expand it.

The team summary gives a quick overview of work that is assigned to the team.

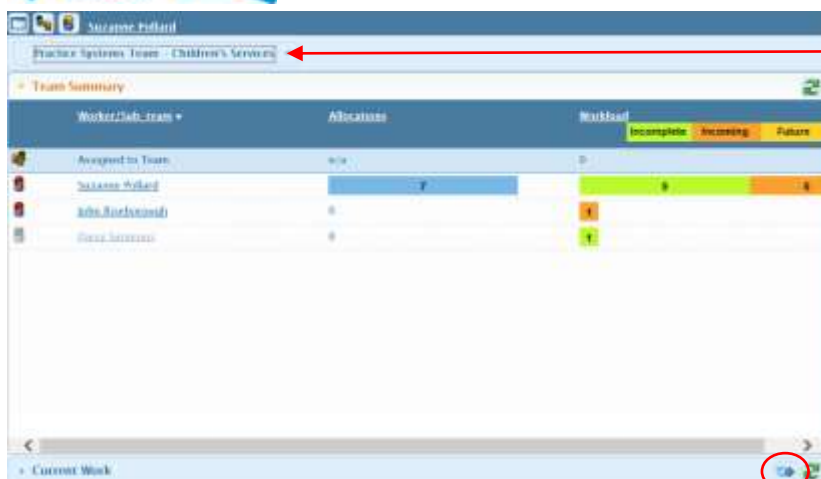
Bulk assign icon

Work and requests that have been assigned to members of the team are displayed and you are able to assign work to other workers and/or navigate to see what a particular worker is working on from this window.

(Team workflows are easiest to access using full workview).

Reassigning the work of former team members

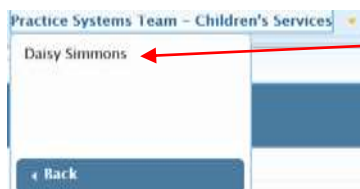
If a team member moves on to another team or leaves WSCC and still has work in progress, a list of former team members is available to help you see what is outstanding and to reassign their work to a different worker:




Click on the team name

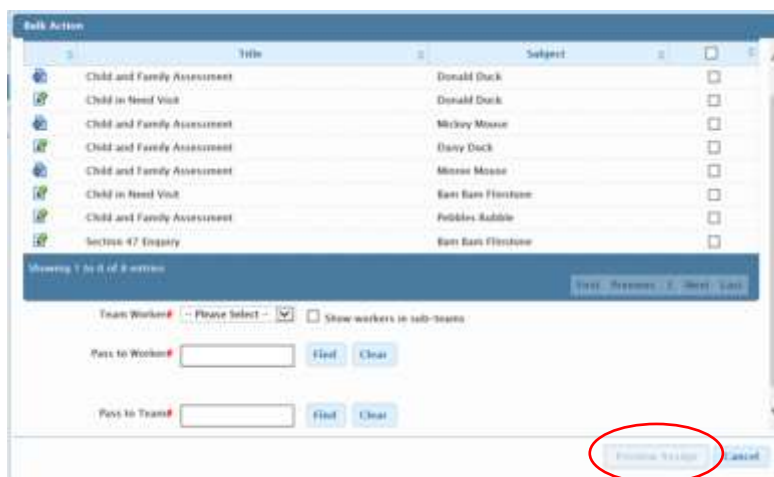


Click on *Former Team Members* to display a list



Click on the workers name to see what work is outstanding
OR click on the  icon to assign their work to a different team member (see below).

You can bulk assign work for a worker or a team by clicking the  icon.



All the current work is listed, you can filter the list, select individual items by clicking the check box to the right or click on the check box in the header bar to select all the current work.

You can select an individual worker or sub-team worker to assign the work to or use the *Find* button to find a team to assign the work.

Once you have selected a worker or team, the *Preview Assign* button is enabled, clicking on this shows which of the selected items can be reassigned.

You can add an optional note to the worker or team that is receiving the work here.

Click > Assign

Reallocating people in bulk

Workers with a management role can reallocate people allocated to themselves, other members of their team, to another team member or, with the *Assign Work to Any Worker or Organisation* to any worker in Mosaic.

You can change the allocations of a worker you are acting for, or from the team view for members of your team:

Acting for John Riseborough you can see he has three people allocated to him. The icon to change the allocations is in the top right (this is only visible in *Full Workview*)

To move these allocations to a different person Click>



Select the people to move allocations to another worker.

Select a worker from the Team Worker list

If you have the **Assign Work to Any Worker or Organisation** system function in your worker role you and also click **Find** to search for a worker not in your team with the **Pass to Worker** field

Additional Help and Useful guidance

Mosaic Support

Configuration and Development


Contact number: 0330 222 8777

For anything non-urgent email: configanddev@westsussex.gov.uk

The Configuration and Development Team receive a significant number of emails each day, many of which do not have sufficient information for them to action immediately. They then have to communicate further to clarify the request which can cause further delays and take up valuable time.

When making a request the following information is required as a minimum

Minimal information Requirements

All requests	give as much information as possible including Mosaic Person ID number
Access to Restricted Records -	to give a worker access to a restricted record we require an authorisation email from allocated Team Manager . We do not accept authorisations from SSWP for access to restricted records.
New restrictions	please provide reason for restricting as this must be entered in a ' Reason for Restriction ' case note, this is to assist managers in understanding why a record has been restricted and who has access.
Document or case note deletion/amendment	give full title to ensure we action against the correct one.
Case Note	<p>remember to click finish on case notes when completed.</p> <p>If you click Save and Close this will leave the case note open and it will time out after 24 hours.</p>  <p>Save and Continue allows you to save case note as typing, this is useful for long case notes.</p> <p>Case notes copied from siblings /other records will need to be sense checked and click on finish or they will remain open.</p>
Step deletions	<p>email to us only after obtaining Team Manager or SSWP authorisation, quoting Person ID number, Step ID number and Name and reason for the deletion. Please send the request first to your team manager or SSWP and ask them to forward email for you to: configanddev@westsussex.gov.uk.</p> <p>Check you have completed steps fully before closing them to avoid having to request steps to be reopened</p> <p>When finishing steps check you have the correct date for next actions</p>
Children's Steps ICPC Part 1 RCPC Part 1	<p>Please ensure you have entered correct dates and chosen correct Next Actions as these steps cannot easily be reopened.</p> <p>If a 'roll back' is required you will need to re-input data which is time consuming.</p>

	If steps need to be reopened please give a reason to enable us to take the correct actions.
Duplicate records	conduct a thorough search before creating Person records to avoid duplicates. It takes significant time to correct duplicates.
Merge Duplicates	For any confirmed duplicate records to be merged, please quote the Person Name and ID number for both records.

HANDY TIPS

Maintaining account	If you do not use Mosaic regularly please remember to log in frequently to avoid losing access.
Adults Mosaic Guidance	Guidance for Adult's Social Care including Mosaic Guidance West Sussex Connect to Support Professional Zone
Childrens Mosaic Guidance	Guidance for Children's Social Care including Mosaic Guidance: Tri.X
Searching	When searching for person records, enter the first two letters of the last name and initial of the first name, you can also narrow down the selection by selecting male/female and or adult/child. This will give you a wider search list and will help to avoid creating duplicate records. You can also conduct further searches by postcode and date of birth.
Reassigning incoming work	If you have work in your incoming work folder that needs to be reassigned to another worker your Team Manager will be able to reassign via team folders.
Cancelling incoming work	If you have work in your incoming work folder that is no longer required your Team Manager can cancel these via team folders giving a cancellation reason for audit purposes.
Team Changes	Team Changes - if you are in the wrong team or change your team in Mosaic, please ask your Team Manager to complete a Mosaic ACS Request via Service Desk Online.

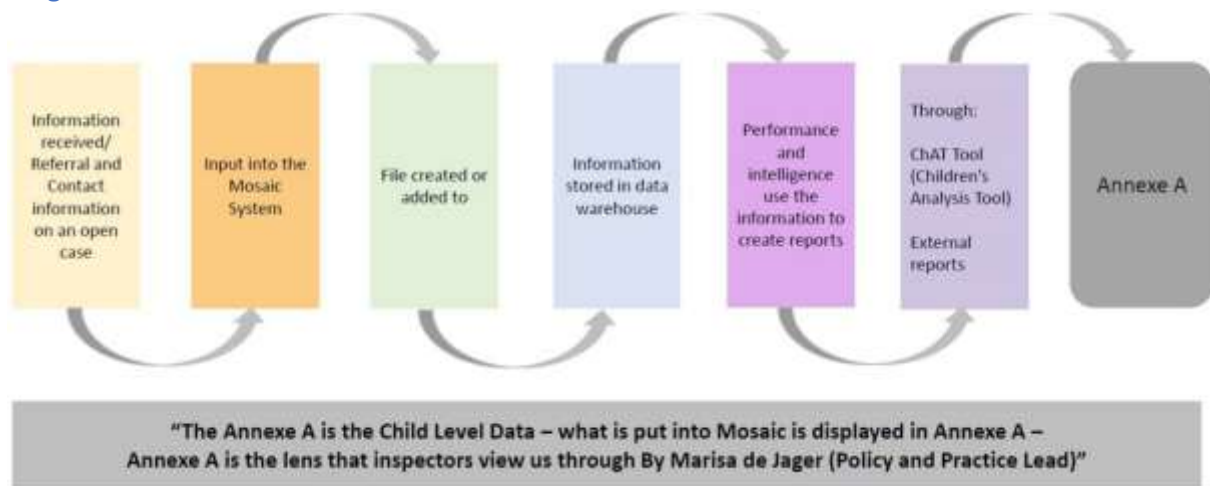
C&DT do not support the following, please contact IT Service Desk on 01243 777979 or via Service Desk Online [Service Desk Online](#) for:

Laptop issues
Bitlocker password resets
Connectivity/ Network issues /Wifi
Outlook
Sharepoint
Network Drives:

SAP
Lync phones
Mobile phones
Issues booking Annual Leave
Mileage /expenses

Please be assured Config & Dev are doing our best to support you and ensure you can complete your work as quickly as possible.

Diagram: Link between Annexe A and Mosaic



Glossary

A

Act For

This is where a worker can assume the role and permissions of another worker, however a worker cannot assume the other worker's permissions with respect to any *Restricted Persons*.

Address Type

For example: Main Address, Temporary Address, Placement Address, Other Address. Each address recorded against a Person must be given an *Address Type*. Note: Address type is not used by Mosaic to determine what displays on the Personal Details, neither is it used by the system to determine where a person is living, where letters are addressed etc.

Alert

This is a message to a worker to inform them that something requires their attention. When a new alert is received it appears as a pop-up and also appears in the *Current Work* pane in *Workview* (when workview is sorted by Type it will appear in an Alerts folder). Clicking on the incoming alert icon in Workview and selecting Acknowledge displays the alert in a popup, where the worker can view and acknowledge it. Once an alert is acknowledged it is removed from the *Workview*

Allocations Pane

Shows a list of people, on your *Workview*, for which you have a current worker relationship. Allocations have their own dedicated 'pane' in the new workview

Allocated Worker

The worker with overall immediate responsibility and case management for a particular person.

B

C

Case Note

A brief free text record of some relevant information about a person. For example, a note of a telephone conversation.

Current Work

In the workview the pane marked 'Current Work' contains all the current user's assigned work, requests and alerts.

D

Display Address

The person address list in Mosaic allows any one of the addresses recorded to be designated the 'Display Address'. This determines the address that displays on the Person Summary Page. Note: this may not be the same as the *Primary Address* and so vigilance is needed to ensure any correspondence is mailed to the correct address.

Document

A document in Mosaic can be an external document uploaded to a person's file to form part of the record (for example email, word files, video files, or scanned documents) or Mosaic Forms or Letters that capture data entered by a worker.

F

Form

In Mosaic, a form allows workers to collect and share elements of a case. They can be exported, printed, sent and stored.

G

Genogram

A family tree, showing the relationships between a group of people in Mosaic.

H

Home Page

The Mosaic view that shows who you are, which organisation you work for, when you last logged on and the version of Mosaic. It may also display a locally defined message. For example, requirements regarding confidentiality and data protection. The Home Page provides access to the main menu options.

I

J

K

L

Letter

A Mosaic site can have a number of standard letters defined, which can be created against a person record, stored and sent out to the designated recipients.

LAC

Looked After Child. In West Sussex we use the term Child Looked After (CLA) out of respect for the person however the term LAC is still used in some of Mosaic's work panes.

M

N

Next Action

The options offered on completion of a piece of work. They conclude a piece of work and introduce the next work item or end the involvement. A piece of work can have more than one next action and so start different parallel workflow processes.

Notification

Notifications are e-mails that may be configured to be sent to external teams or workers who are recorded on the system as working with the subject but who are not direct users of Mosaic. Because they are not users of the system, notifications take the place of warnings and alerts.

O**Organisations**

Organisations are either suppliers who provide services for a Person/People; teams, departments, external agencies, hospitals, schools, and residential units.

The team you work for would be an Organisation.

Outcome

Now called a Next Action in Mosaic.

P**Person**

In Mosaic, a person could be a Service User, Foster Carer, Informal Carer, Adopters, Family Member or Other Interested Party.

Primary Address

The address that is used throughout the system. For example for populating forms, addressing letters, generating proximity alerts, reporting, interfaces and so on. Every person in Mosaic must have an address recorded. Where one address exists this is automatically regarded as the Primary Address; where there is more than one addresses the worker can select which one should be the Primary Address.

Primary Role

Every worker in Mosaic is given one or more worker roles. One of these roles must be designated the Primary Role and it is that role that determines the functions a worker can perform when logged in to Mosaic.

Professional Relationship

A generic term that indicates that this person or group have a relationship with a worker, an organisation or a key contact.

People

People in Mosaic are any people who are involved in a case personally, rather than in a professional capacity. This could be the child or young person, their relatives, household members, carers, or friend.

Each individual's record in Mosaic is called a Person Record. When we go onto a Person Record, Mosaic defaults to showing you their *Person Summary* Record.

Q**R****Recently Viewed**

The **Recently Viewed** pane lists the last ten records viewed by the current user and their current work.

Restricted Person

A person whose Mosaic record has been restricted from general access. Only designated workers, teams and worker roles can view the person record. Workers not belonging to one of the designated groups see only the person id, person name, date of birth and gender.

Request

An activity within a step that requires action or approval from a worker or team.

S**Subject**

In Mosaic, subject is a generic term for person, worker or organisation as they can all be the subject of workflow

Swim Lanes

Swim lanes are charts that describe who does what action within a workflow, for example a social worker will complete a task and this is sent to a practice manager to authorise, they may then notify admin personnel to complete additional tasks before the step is finished. Each work flow chart has a connected swim lane chart and these are uploaded to Tri.X.

T**Team Work**

Where workers have the leading role conferred on them they have access to any work assigned to their team.

U**V****W****Warning**

A person note that displays top left on the Personal Details page in red text with warning triangle alongside. A warning can be entered manually from the **Amend** → **Notes** side menu, or can be generated automatically (for example because someone living in the vicinity of the subject or someone related to the subject has had a warning added to their record).

Worker

Includes any worker, internal or external to Social Care whose has a professional relationship to a person. For example, Health Visitors or GP's, Social Workers, District Nurse and so on. Some workers have an account to log in to Mosaic, others do not. Anyone working with a Person in a professional capacity is a worker; whether they are workers who use Mosaic, such as WSCC social workers, managers or administrators, or external professional such as GPs, teachers, health visitors or housing officers.

Only staff employed by WSCC that have been trained and vetted to use Mosaic will be provided with log in accounts for system access, however there are some professionals who have been granted special 'read only' access.

Several workers can work on the same case over time, or jointly, and they can share information and pass work between them; if deemed appropriate.

Worker Role

Each worker in Mosaic is given a worker role like Social Worker, System Administrator, GP, District Nurse and so on, which describes the type of job they do (it does not necessarily describe to their actual job title). The primary worker role determines the functions that a worker can perform when logged in to the system.

Worker Relationship

If a person's case is allocated to a worker, that worker has a worker relationship with that person.

Workflow

Workflow is a collection of two or more worksteps specifically arranged in a particular sequence in which practitioners record details or levels of the intervention/support provided to service users. It is

also a pathway that allows the smooth transition of a person's case. All the workflow charts are uploaded to Tri.x

Workview

When you log in to Mosaic, your Workview is shown first in its expanded form. The Workview shows Allocation, Current Work, Recently Viewed Work, Alerts and Work for Teams. It also provides quick access buttons for common tasks and allows a worker to act for a different worker.

X

Y

Z

Review / Contacts / References	
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