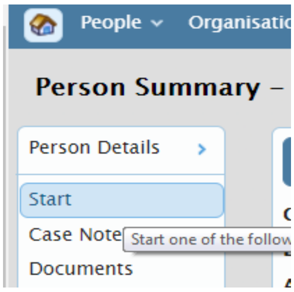
MOSAIC Allocate and De-Allocate Worker Guide

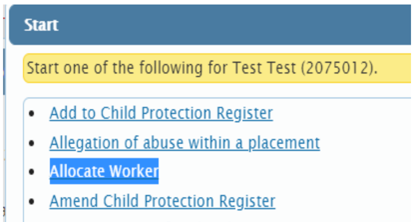
Contents

Allocate Worker

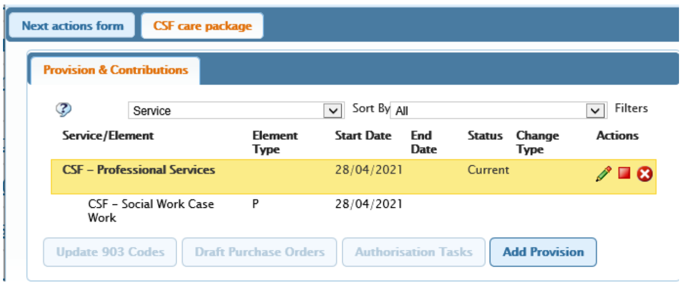
To allocate or de-allocate a case you need to be on the Person Summary screen of the child/young person.



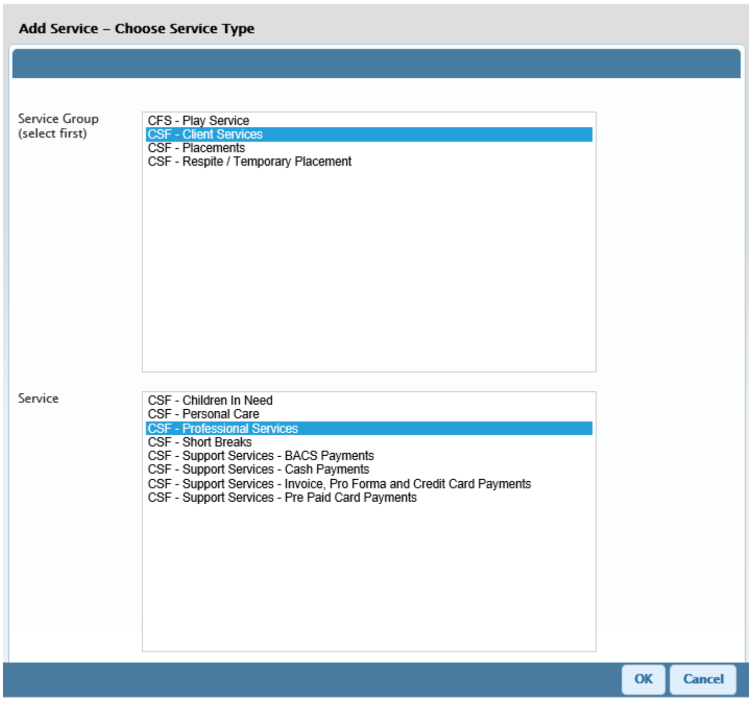
1. Open the Mosaic record of child or young person to display the **Person Summary** screen
2. Select the **Start** option from the side menu to display the list of Mosaic steps that can be started adhoc.



3. Select **Allocate Worker** option to display the Allocate worker screen

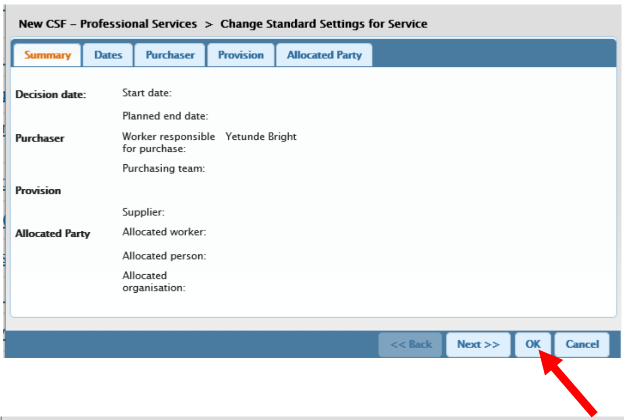


4. Click on **'CSF Care Package'** tab to open it
In the **Provisions & Contributions** page:
Click on the **Add Provision** button to display the **Add Service – Choose Service Type** screen

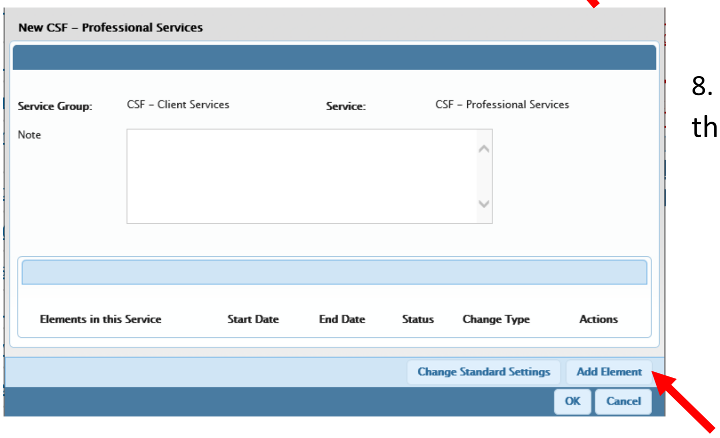


5. Select first the Service Group: **'CSF-Client Services'**

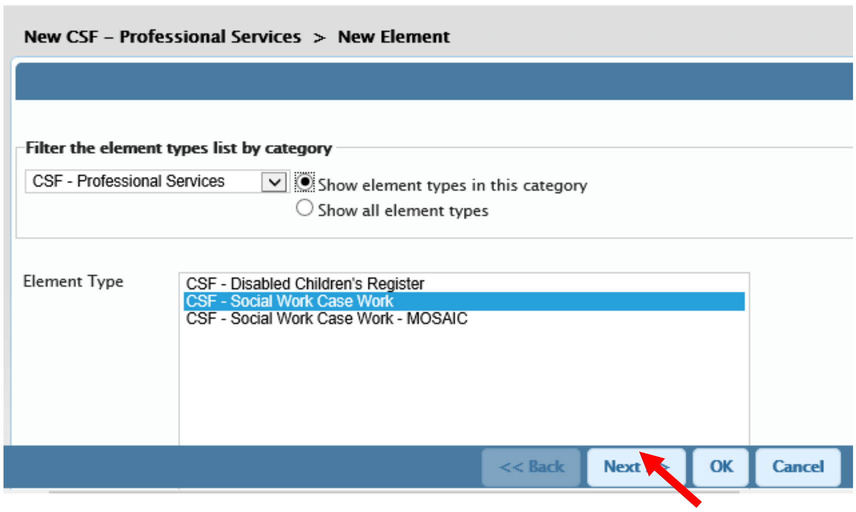
6. Then select the Service Type: **'CSF – Professional Services'.**
Click **OK** to save your choices and display a **Summary** screen.



7. On the **Summary screen,** click **OK** to display the ***'New CSF – Professional Services'*** screen**.**



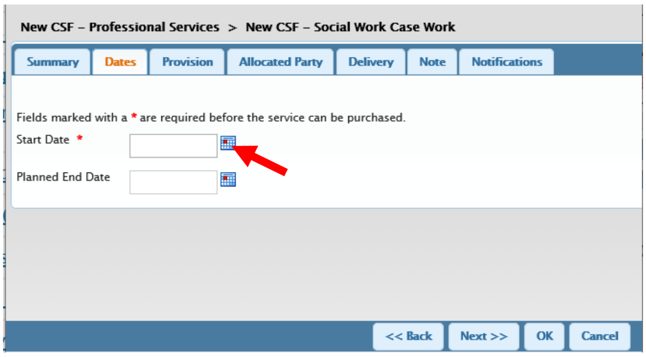
8. Click the '**Add Element'** button to display the **'New Element'** screen.



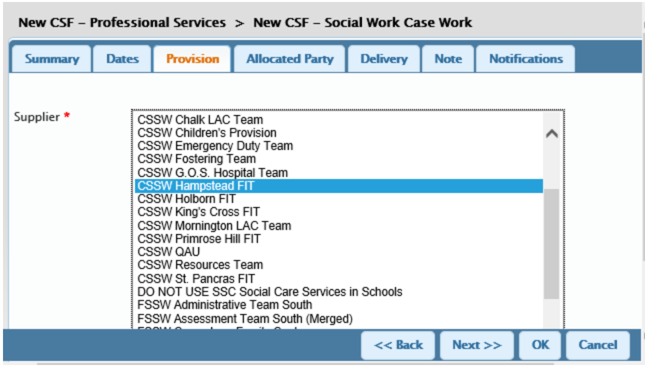
9. Select Element type as **'CSF – Social Work Case Work'.** Then click **'Next'** to display the **New CSF -** ***Social Work Case Work*** **Summary** screen**.**

10. You will need to provide the three items of information marked as **'Required'** to complete the case allocation. To do so, *click directly* on the applicable *tab* or use the *next button* to move from tab to tab.

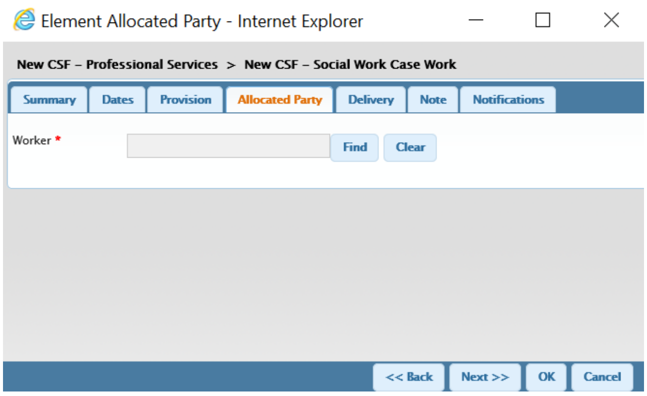
Click next to go to the **'Dates'** tab.



11. On the **'Dates'** tab, enter in the ***Start Date*** of the case allocation.
Click **'Next'** to go to the **'Provisions'** tab.

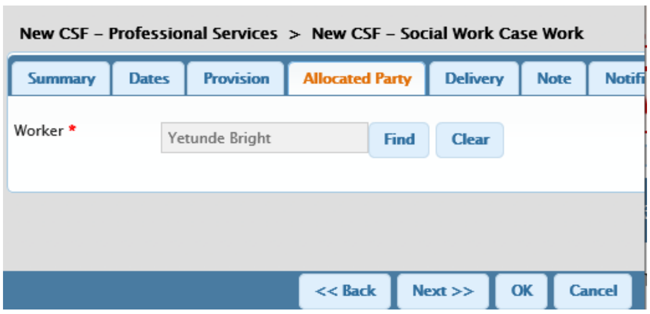


12. On the **'Provisions' tab,** select the team of the *allocated worker* from the list provided.
In the example below, ***CSSW Hampstead FIT*** is selected.
Click **'Next'** to go to the **'Allocated Party'** tab.

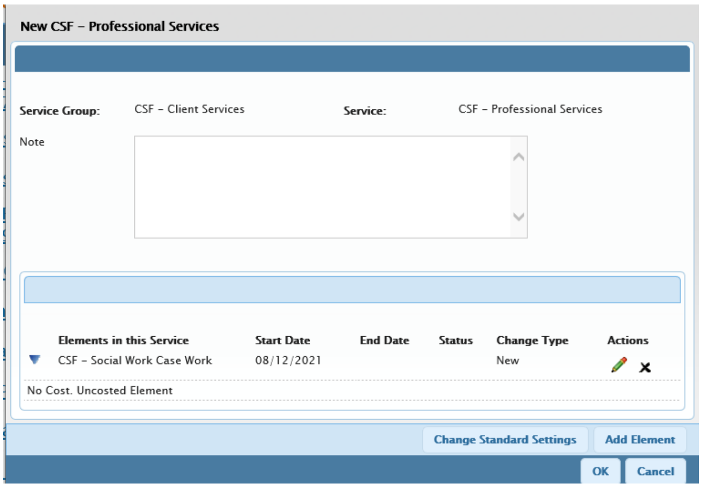


13. On the **'Allocated Party'** tab, click the **'Find'** button to display the **'Find Allocated Worker'** dialog box to enable you search for the allocated worker.

14. Enter in part of the ***last or first name (or both)*** of allocated worker and click **'Find'**.
Select the *allocated worker* from the search result list.
This will close the 'Find' screen

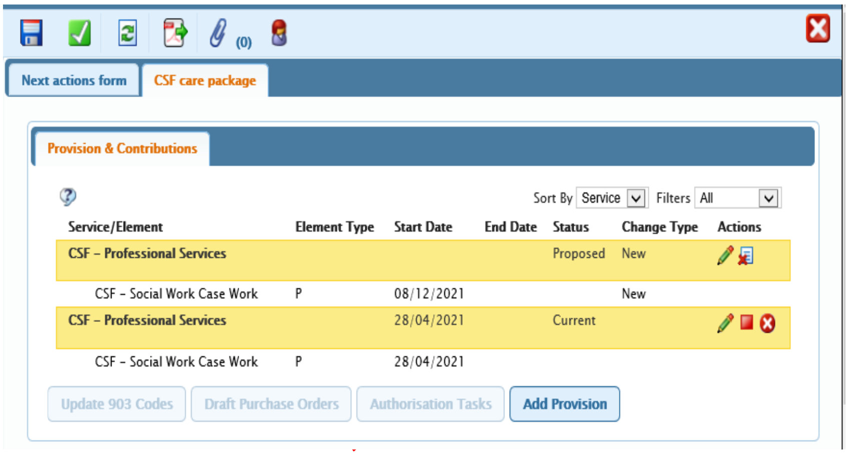


15. *Allocated worker's* name is displayed in the **Worker** field.
You have now provided the *three required* pieces of information.
Click **'OK'** to display the **New CSF – Professional Services** screen.

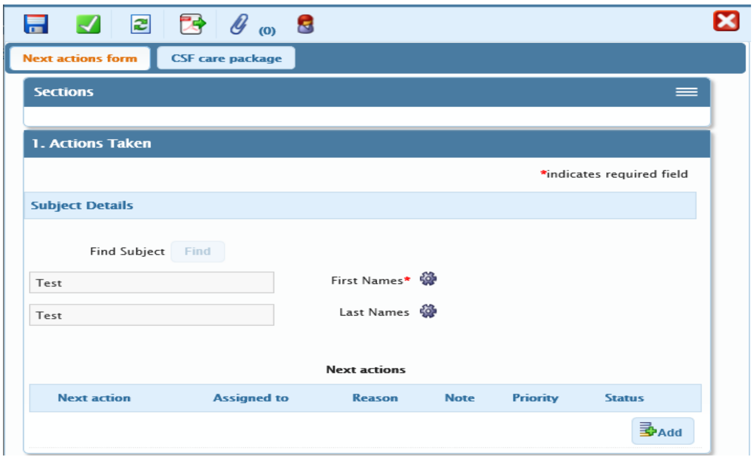


16. This summary page displays your choices:
    - Service Group – CSF Client Services
    - Service – CSF Professional Services
    - Element – CSF Social Work Case Work
    - Element Start Date – 08/12/2021 (Example)
    - Change Type - New

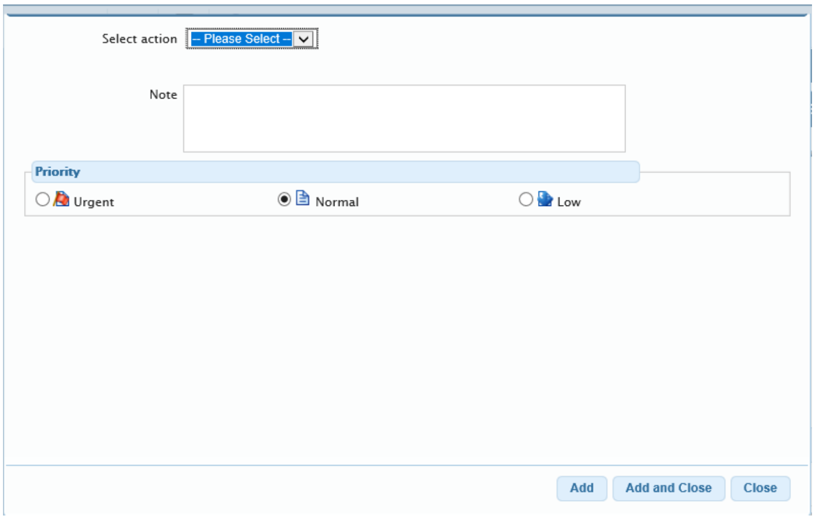
Click **'OK'**.



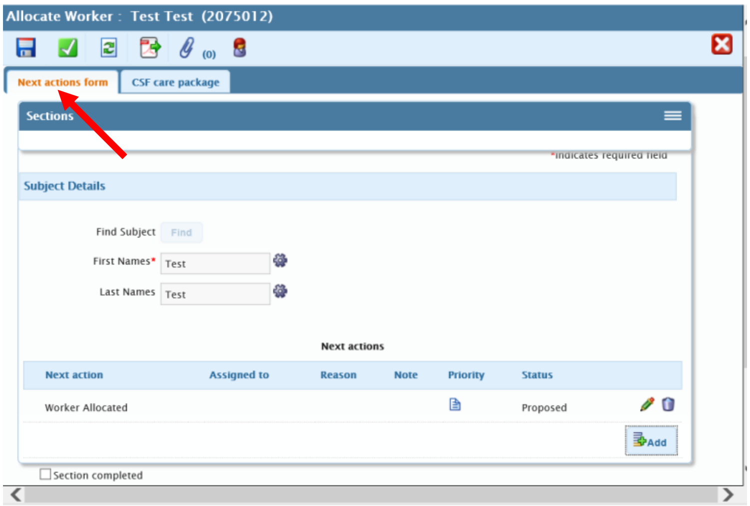
17. On the screen shown below, click on the **'Next actions form'** tab to open it.



18. In the **Next actions form,** click the **'Add'** button.



19. In the **Select action** field:
 Click on **'Please Select'**
Select **'Worker allocated'** from the list**.** Click the **'Add and Close'** button.



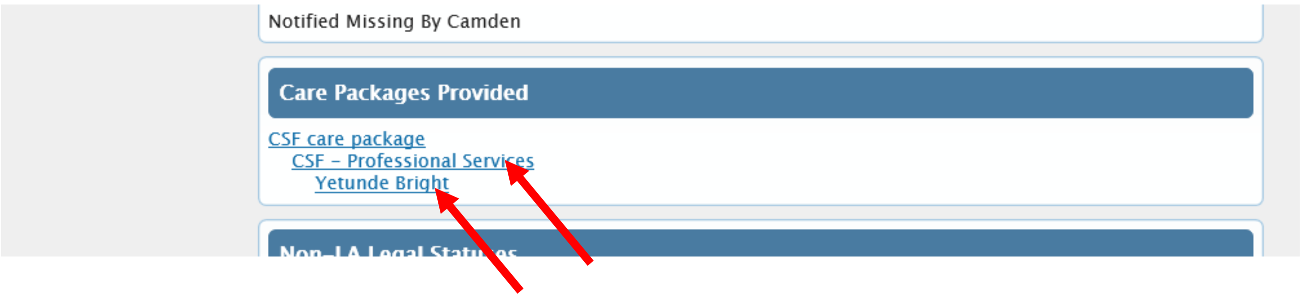
20. Click the **'Finish'** icon (green with white tick mark).

Verify/Check Case Allocation and De-allocation

There are two ways to verify that case allocation has been done correctly. Opposite will apply for de-allocation.

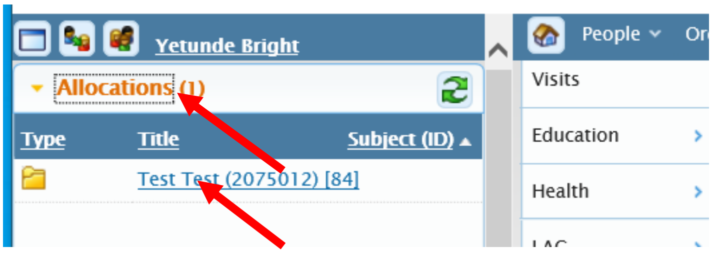
1. **Person summary page of client/ Care packages provided section:** *Service provision and Allocated Worker's* name should be displayed as below.

   *If case has been **de-allocated**, the worker's name should not be showing in the care packages section with effect from the ***end date*** specified in the de-allocation step.



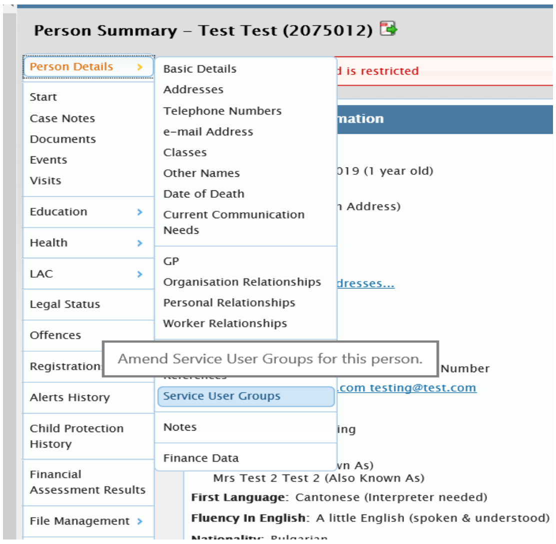
2. **Allocated Worker's work folders/Allocations:** Child's name should be in the workers allocation list as shown below.

   *If case has been **de-allocated**, Client's name should not be on the allocations list with effect from the ***end date*** specified in the de-allocation step.



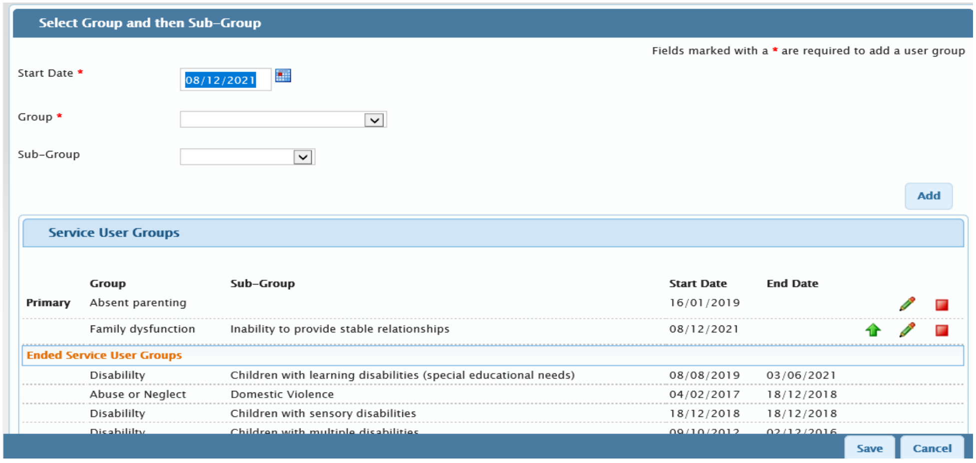
Add/Update Service User Group

If a service user group (SUG) is not specified for the client, it will not be possible to complete the Allocate Worker step. So, if you have problems completing one, check that child has a **current SUG** recorded.



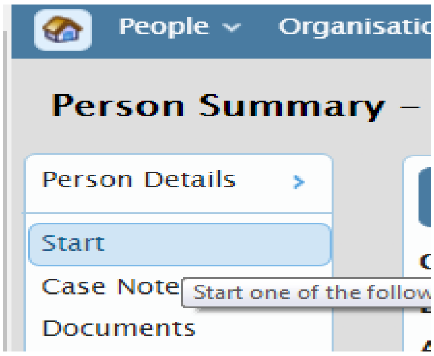
1. On the side menu of the person summary page for child/young person, click **Person Details/Service User Groups**

2. **Service User Group (SUG)** screen is displayed as shown below.

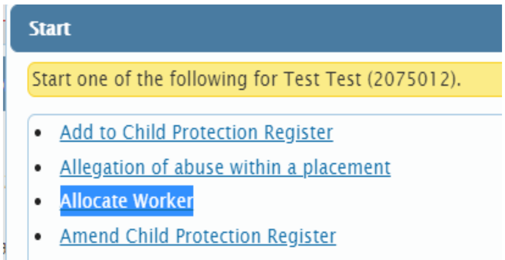


- The **Current SUG** will have <u>no</u> ***End Date*** unlike the historical ones listed on the SUG table
- *To record a **new SUG** where all previous SUG's have been **ended** or one is being recorded for the **first time**:*
  i. Enter the **Start Date**
  ii. Select the **Group** and **Sub-Group**
  iii. Click **'Add'** and '**Save**' to exit
- To end a **current SUG**:
  Click the **red square** icon next to the entry to enter an **End Date** and '**Save**' twice to exit.
- To edit the **date(s)** of an existing **SUG**:
  Click the **green pencil** icon next to an entry to edit its **Start/End date.** '**Save**' twice to exit.
- To set the **Primary** SUG:
  i. Where there is only **one current SUG**, it automatically designated the **primary SUG**
  ii. In cases of ***multiple SUG*** entries, click on the **green arrow** to **change/designate** an entry as **Primary** SUG and **'Save'** to exit.

De-Allocate Worker



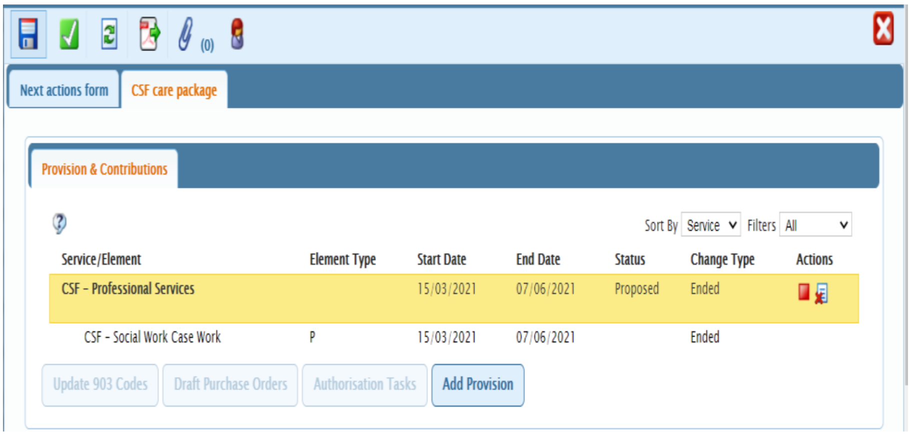
1. Open the Mosaic record of child or young person to display the **Person Summary** screen
2. Select **Start** option from the side menu to display the list of Mosaic steps that can be started adhoc.



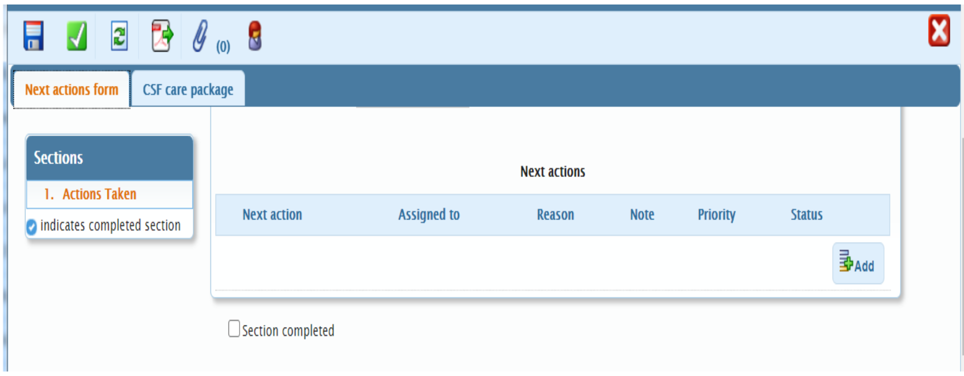
3. Select **Allocate Worker** option from the list to display the Allocate worker screen

4. Click on **'CSF Care Package' tab** to open it and display the **Provisions & Contributions tab**:
On the **Service/Element** table **Click** on the **red square icon** of the ***Professional Service*** with **Current** Status
(Note: It will have no end date and it has a Social work case work element listed below it)

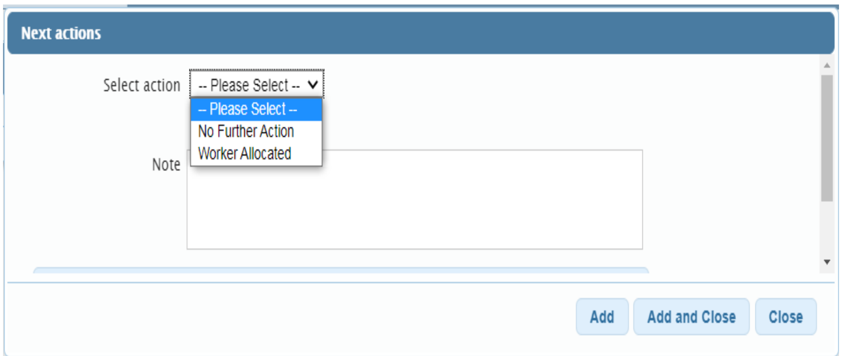
5. **The End CSF – Professional Services** dialog box is displayed. Enter the **Service End Date** and click **'Save'**.



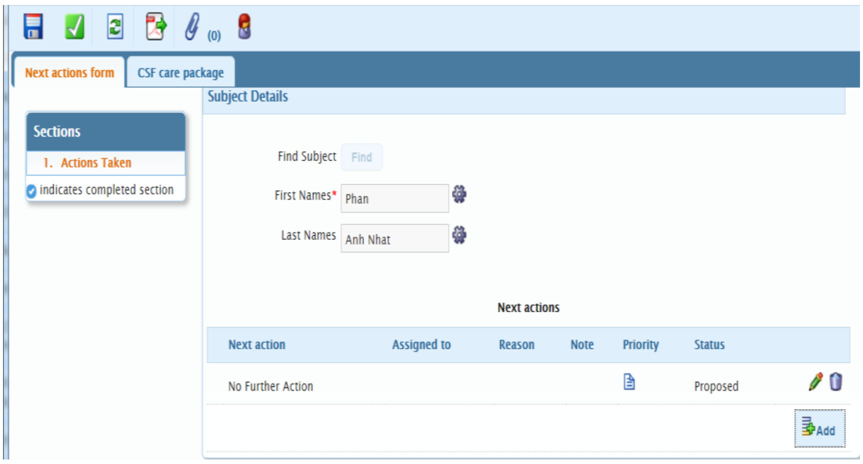
6. The **Service/Element** table is then updated:
Professional Services: *End Date*
SW Case Work: *End Date*
Status: *Proposed*
Change Type: *Ended*



7. Click on the first tab – **'Next actions form'** and then **'Add'** button to display the ***Next actions*** dialog box/window.



8. Click in **Select action** field and select the option of **'No Further Action'**, then **'Add and Close'**



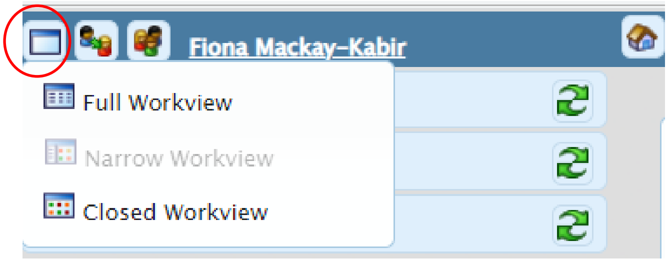
9. Click the green **'Finish'** button

Bulk Case Allocation/De-Allocation

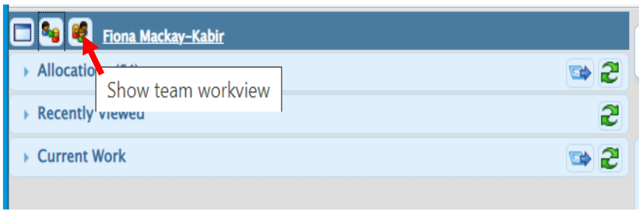
Mosaic has a **bulk allocation feature** that makes it super easy to re-allocate multiple cases at a time. To do so look for the **blue bulk allocation icon** on the **Allocation Pane**

Note that bulk allocation/de-allocation cannot be used for first time allocations or for de-allocating cases due for closure.

*Take the following steps to bulk allocate cases from **one worker to another***

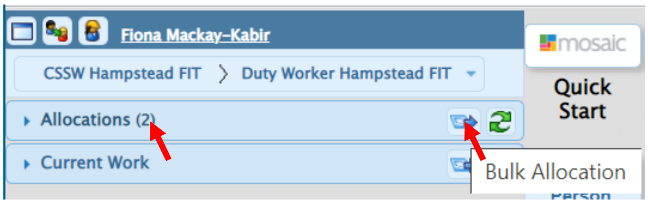


1.On your home page, click the **Workview icon**, select **Full Workview**



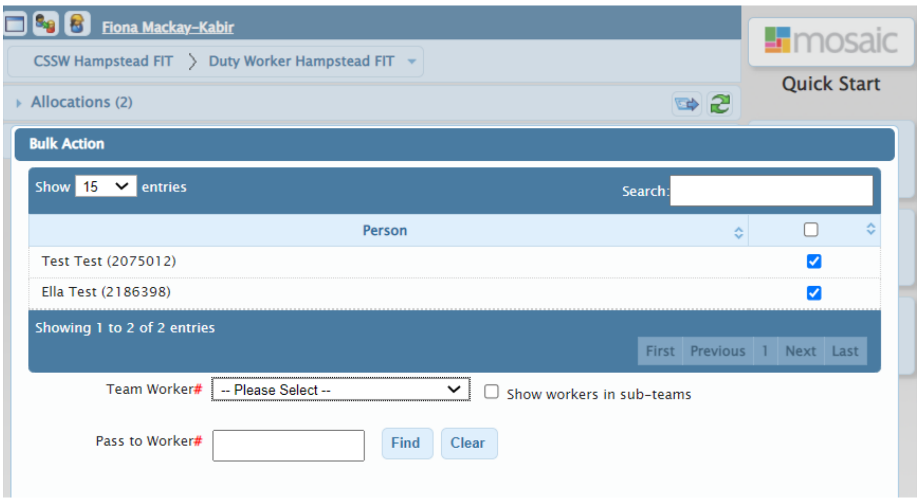
2.Click the **team workview icon** to show the team workview.

3.In team workview, the **Team Name**, **Team Summary** and **Current work panes** are shown.
Click on the Team Summary pane to expand it. *Select* the **worker** from the listed team members to display their **Allocations** and **Current work panes.**



4. Notice that the worker in the screenshot has **two cases allocated** within the list of team members

5.Click the **Bulk Allocation icon** to open the bulk action screen. Note that it is only available in Full Workview

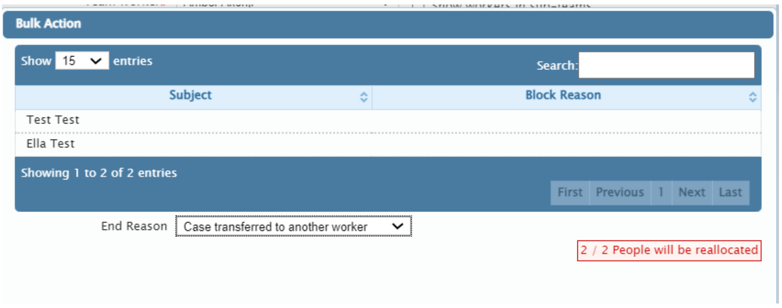


6.Select the cases you want to allocate to the *same person* for the *same reason*.

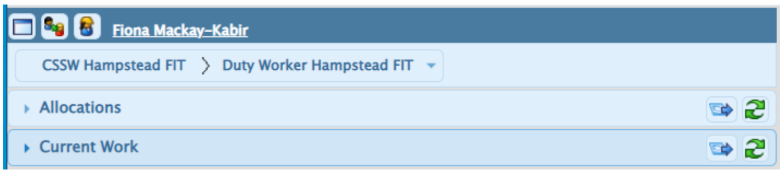
7.Please ***Select*** from **Team worker list**, the worker to receive the selected cases *if in the same team* **OR**

8.Use **Find button** to indicate the worker to receive the selected cases, *if from a different team*

9.Click the **Preview Assign button** at the bottom of the screen to preview selection



10. If ok with the choices made. Please *select* **End Reason** and *click* the ***Assign*** button at the bottom of the screen. *Click* **Cancel** on the next screen to **exit.**



11. Notice that the Worker *(Example: Duty Worker Hampstead FIT)* no longer has any allocations. ~~since its previous~~ ***2 allocated cases*** has been successfully *allocated to another worker.*

12. If ~~need be~~ required ***update changes*** to display all contents of the allocations folder using the ***green refresh icon*** on the Allocations pane

13.Always verify that de-allocation from one worker and allocation of same to another worker has been correctly and successfully done. Use following link for instructions on how to: **Verify/Check Case Allocation and De-allocation**.

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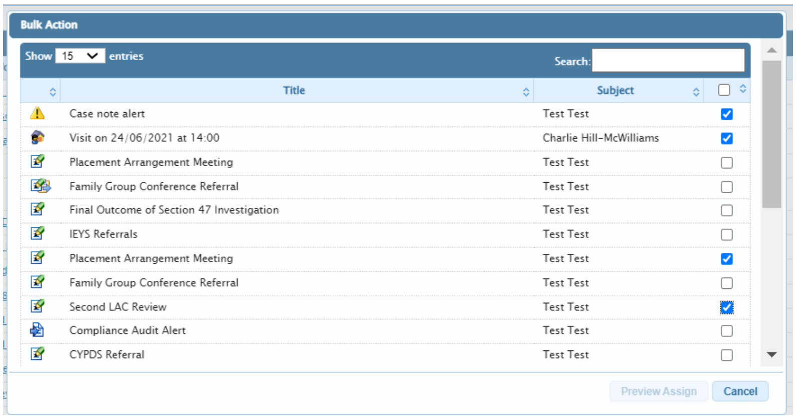
Bulk Assign Work

Alerts, visits, incoming, incomplete or future work can be ***bulk assigned*** from one worker to another.
Follow *same steps as for Bulk Case Allocation with one difference*, you work in **worker's Current Work pane** and *not their Allocations pane* as shown below.

1. From **Full Workview**, access **Team Workview**, select worker and click on the **bulk assign icon** on the *Current Work pane to expand it.*



2. Select **all items of work** to be assigned.

i. Select from Team list or Find ***recipient worker***.

ii. Use the **Preview Assign** button to preview selection.

iii. If ok, **add Notes** where Necessary and click **Assign button.**

iv. On next screen click **Cancel** to Exit.

3. Verify by checking both previous worker's and new worker's work folders to ensure that **work is/is no longer there.**