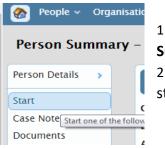
MOSAIC Allocate and De-Allocate Worker Guide

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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.

Sta	rt
Sta	rt one of the following for Test Test (2075012).
•	Add to Child Protection Register
•	Allegation of abuse within a placement
•	Allocate Worker
•	Amend Child Protection Register

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

Provision & C	Contributions						
Ţ	Service		Sort By A	11			▼ Filter
Service/E	lement	Element Start Date End Type Date		Status Change Type		Actions	
CSF - Pro	fessional Services		28/04/2021		Current		d 🖬 🖉
CSF - Work	Social Work Case	Р	28/04/2021				

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

Add Service – C	hoose Service Type		
Service Group (select first)	CES - Play Sarvice CSF - Placements CSF - Respite / Temporary Placement		
Service	CSF - Children In Need CSF - Personal Care CSF - Frotessional Services CSF - Shupport Services - BACS Payments CSF - Support Services - Cash Payments CSF - Support Services - Invoice, Pro Forma and Credit Card Payments CSF - Support Services - Pre Paid Card Payments		
		ОК	Cancel

5. Select <u>first</u> 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.

Summary Da Decision date: Purchaser Provision	essional Services > Change Si tes Purchaser Provision Start date: Planned end date: Worker responsible Yetunde Bi for purchase: Purchasing team: Supplier:	Allocated Party	Service		. On the Summary screen, click OK to display ne 'New CSF – Professional Services' screen.
Allocated Party New CSF - Profe	Allocated worker: Allocated person: Allocated organisation:		< <back next="">> OK</back>	Cancel	
Service Group: Note Elements in t	CSF - Client Services	Service:	CSF - Professional Servic	Actions	8. Click the ' Add Element' button to display the 'New Element' screen.
			Change Standard Settings	Add Element OK Cancel	

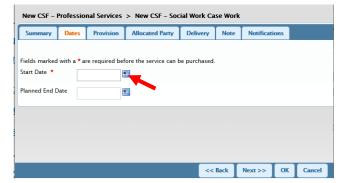
New CSF – Profe	essional Services > New Element			
	. Fall a			
CSF - Professiona	Services Show element types in this category	,		
Element Type	CSF - Disabled Children's Register CSF - Social Work Case Work CSF - Social Work Case Work - MOSAIC			
	<< Back	Next	ОК	Cancel

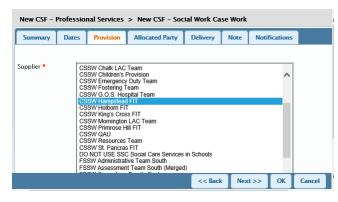
9. Select Element type as 'CSF
– Social Work Case Work'.
Then click '<u>Next</u>' to display the
New CSF - Social Work Case
Work Summary screen.

New CSF -	Professio	nal Services >	New CSF – Soc	ial Work Ca	se Work			
Summary	Dates	Provision	Allocated Party	Delivery	Note	Noti	Fications	
Dates	;	Start date:	REQUIRE					
		Planned end date:						
Provis	sion	Supplier:	REQUIRED					
Alloc	ated Party	Allocated wor	ker: <u>REQUIRED</u>					
Deliv	ery	Frequency:	Weekly					
Notifi	ications	Notification to	o: Resource Tea	m				
				<< Back	Nex	t >>	ОК	Cancel

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.





🤗 Element Allocated Party - Internet Explorer 🛛 🗌 🗌

New CSF -	Professio	nal Services	> New CSF - Soc	ial Work C	ase Worl	k		
Summary	Dates	Provision	Allocated Party	Delivery	Note	Notificat	ions	
Worker *				Find	lear			
				<	Back	Next >>	ОК	Cancel

 \times

Q Find Allocated	l Worker		
			At least one field marked with a # is require
last Name #	right	×	
First Name #			
			Find Cancel
Other Workers	Job Title	Role	Organisation
Yetunde Bright		Corelogic Worker	CSSW Children and Families Division
Yetunde Bright Ecaf		eCAF Worker	CSSW Children and Families Division

New CSF – I	Professio	nal Services	> New CSF – So	cial Work Ca	se Work	
Summary	Dates	Provision	Allocated Party	Delivery	Note	Notif
Worker *	Ye	tunde Bright	Find	Clear		
			<< Back N	ext >> 0	ж Са	ncel

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.

ervic	e Group:	CSF – Client Servic	es	Service:	CSF	- Professional Servi	ces
ote						^	
						\sim	
	n	this Service	Start Date	End Date	Status	CI	Actions
Ŧ		i this Service I Work Case Work		End Date	Status	Change Type New	Actions

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'**.

🗾 🖻 📴 🖉 👩 🖡	3					
tt actions form CSF care package						
Provision & Contributions			5	ort By Servic	e 🗸 Filters A	
Service/Element	Element Type	Start Date	End Date	Status	Change Type	Actions
CSF - Professional Services				Proposed	New	N 😠
CSF - Social Work Case Work	Р	08/12/2021			New	
CSF - Professional Services		28/04/2021		Current		🥒 🖬 🚷
CSF - Social Work Case Work	Р	28/04/2021				
Update 903 Codes Draft Purcha	ase Orders A	thorisation Tag	iks Add	Provision		

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

ext actions form	CSF care package					
Sections					=	
I. Actions Taken						
				*indica	ates required field	
Subject Details						
Find Subject	Find					
Find Subject	Find	First Names* 🕯	*			
Test	Find					
Find Subject Test	Find	First Names* 🕯 Last Names 🕯				
Find Subject Test	Find					
Find Subject Test	Find					
Find Subject	Find Assigned to	Last Names 🤞		Priority	Status	

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

Select action	Please Select 🗸		
Note			
Note			
Priority			
🔿 🖄 Urgent	🖲 🗎 Normal	🔿 Ъ Low	
		Add	Add and Close Close
		bbA	Add and Close Close

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

ate fronker .	Fest Test (20	75012)					
V 2	🔁 🖉 (0)	8					
xt actions form	CSF care package						
ections							=
						*indicate:	s required heid
ubject Details							
First Nan	nes* Test mes Test	\$					
			Next action	15			
Next action	As	signed to	Next action Reason	Note	Priority	Status	
Next action Worker Allocated	As	signed to			Priority	Status Proposed	/ 0
		signed to					Add

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 deallocation.

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.



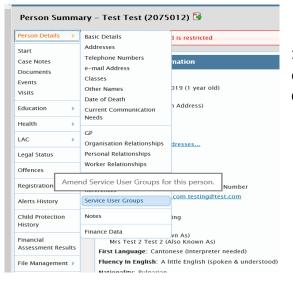
2. Allocated Worker's work folders/Allocations: Child's name should be in the workers allocation list as shown below.

*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.

Service User Group Sub-Group Add Frimary Absent parenting Sub-Group End Date Frimary Absent parenting 16/01/2019 Image: Component of the compone	Select	Group and then Sub	Gloup					
roup •				Fields marked wit	h a * are require	d to add	a user 🤉	gro
ub-Group ✓ Service User Groups Croup Sub-Group Start Date End Date Primary Absent parenting 16/01/2019 ✔ € Family dysfunction Inability to provide stable relationships 08/12/2021 ✔ ✔ € Ended Service User Croups Ub-Group 08/08/2019 03/06/2021 ✔ € € Ended Service User Croups Ub-Group Ub-Group 08/08/2019 03/06/2021 € € € Disability Children with learning disabilities (special educational needs) 08/08/2019 03/06/2021 € € Disability Children with sensory disabilities 18/12/2018 18/12/2018 18/12/2018	tart Date '	•	12/2021					
Add Service User Groups Start Date End Date Primary Absent parenting 16/01/2019 Image: Colspan="2">Image: Colspan="2" Image: Colspa	roup *							
Sub-Group End Date Croup Sub-Group Sub-Group End Date Absent parenting 16/01/2019 Image: Colspan="2">Image: Colspan="2">Image: Colspan="2" Family dysfunction Inability to provide stable relationships 08/12/2021 Image: Colspan="2">Image: Colspan="2" Ended Service User Groups Disability Children with learning disabilities (special educational needs) 08/08/2019 03/06/2021 Abuse or Neglect Domestic Violence 04/02/2017 18/12/2018 Image: Colspan="2">Image: Colspan="2" Disability Children with sensory disabilities 18/12/2018 18/12/2018 Image: Colspan="2">Colspan="2"	Jb-Group		V					
Sub-Group End Date Croup Sub-Group Sub-Group End Date Absent parenting 16/01/2019 Image: Colspan="2">Image: Colspan="2">Image: Colspan="2" Family dysfunction Inability to provide stable relationships 08/12/2021 Image: Colspan="2">Image: Colspan="2" Ended Service User Groups Disability Children with learning disabilities (special educational needs) 08/08/2019 03/06/2021 Abuse or Neglect Domestic Violence 04/02/2017 18/12/2018 Image: Colspan="2">Image: Colspan="2" Disability Children with sensory disabilities 18/12/2018 18/12/2018 Image: Colspan="2">Colspan="2"							Ad	d
Group Sub-Group Start Date End Date Primary Absent parenting 16/01/2019 Family dysfunction Inability to provide stable relationships 08/12/2021 <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th>								
Primary Absent parenting 16/01/2019 Family dysfunction Inability to provide stable relationships 08/12/2021 Ended Service User Croups Disability Children with learning disabilities (special educational needs) 08/08/2019 03/06/2021 Abuse or Neglect Domestic Violence 04/02/2017 18/12/2018 Disability Children with sensory disabilities 18/12/2018 18/12/2018								
Primary Absent parenting 16/01/2019 Family dysfunction Inability to provide stable relationships 08/12/2021 Ended Service User Groups Disability Children with learning disabilities (special educational needs) 08/08/2019 03/06/2021 Abuse or Neglect Domestic Violence 04/02/2017 18/12/2018 Disability Children with sensory disabilities 18/12/2018 18/12/2018	Servi	ice User Groups						
Family dysfunction Inability to provide stable relationships 08/12/2021 1 Ended Service User Groups Disability Children with learning disabilities (special educational needs) 08/08/2019 03/06/2021 Disability Children with learning disabilities (special educational needs) 08/08/2019 03/06/2021 Abuse or Neglect Domestic Violence 04/02/2017 18/12/2018 Disability Children with sensory disabilities 18/12/2018 18/12/2018	Servi	ice User Groups						
Ended Service User Groups Disability Children with learning disabilities (special educational needs) 08/08/2019 03/06/2021 Abuse or Neglect Domestic Violence 04/02/2017 18/12/2018 Disability Children with sensory disabilities 18/12/2018 18/12/2018	Servi		Sub-Group	Start Date	End Date			
Disability Children with learning disabilities (special educational needs) 08/08/2019 03/06/2021 Abuse or Neglect Domestic Violence 04/02/2017 18/12/2018 Disability Children with sensory disabilities 18/12/2018 18/12/2018		Group	Sub-Group		End Date		/	
Abuse or Neglect Domestic Violence 04/02/2017 18/12/2018 Disability Children with sensory disabilities 18/12/2018 18/12/2018		Group Absent parenting	·	16/01/2019	End Date	•	/	
Disability Children with sensory disabilities 18/12/2018 18/12/2018	Primary	Group Absent parenting Family dysfunction	·	16/01/2019	End Date	•	/	
	Primary	Group Absent parenting Family dysfunction ervice User Groups	nability to provide stable relationships	16/01/2019 08/12/2021		•	1	
Disability Children with multiple disabilities 09/10/2012 02/12/2016	Primary	Group Absent parenting Family dysfunction ervice User Groups Disability	nability to provide stable relationships Children with learning disabilities (special educational needs)	16/01/2019 08/12/2021 08/08/2019	03/06/2021	•	1	
	Primary	Group Absent parenting Family dysfunction ervice User Groups Disability Abuse or Neglect	Inability to provide stable relationships Children with learning disabilities (special educational needs) Domestic Violence	16/01/2019 08/12/2021 08/08/2019 04/02/2017	03/06/2021 18/12/2018	¢	1	

- The Current SUG will have no 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**:

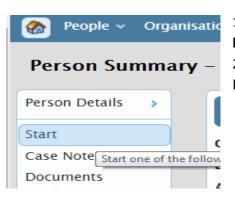
Click the green pencil icon next to an entry to edit its Start/End date. 'Save' twice to exit.

• 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

3. Select Allocate Worker option from the list to display the

X

Allocate worker screen

2. Select **Start** option from the side menu to display the list of Mosaic steps that can be started adhoc.

Start Start one of the following for Test Test (2075012).

Add to Child Protection Register

- Allegation of abuse within a placement
- Allocate Worker
- <u>Amend Child Protection Register</u>

🖥 🗹 🖻 🕏 🖉 (0) 🔮

Next actions form CSF care package

vision & Contributions						
					Sort By Service	♥ Filters All ♥
Service/Element	Element Type	Start Date	End Date	Status	Change Type	Actions
CSF - Professional Services		15/03/2021		Current		/ 🛛 🛇
CSF - Social Work Case Work	р	15/03/2021				

 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

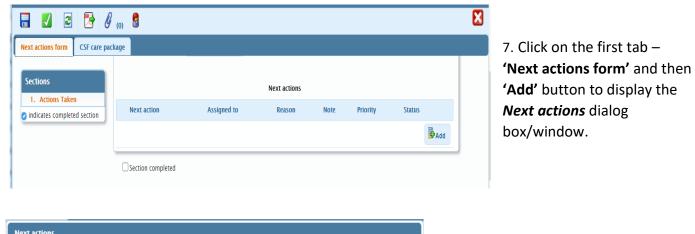
work element listed below it)

End CSF – Profess	sional Services	
Service Start Date	15/03/2021	Fields marked with a * are required for submission
Service End Date		
New End Date*		
		Save Cancel

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

ctions form CSF care package						
ovision & Contributions						
3				Sort B	y Service 🗸 Filter	s All 🗸
Y						
Service/Element	Element Type	Start Date	End Date	Status	Change Type	Actions
-	Element Type	Start Date	End Date 07/06/2021	Status Proposed	Change Type Ended	Actions

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



ield and select **r Action**', then

h' button

								_	
Next actions									
	Please Select V Please Select No Further Action Worker Allocated							8. Click in Select acti the option of 'No Fu 'Add and Close'	
				Add	Add	and Close	Close		
🖥 🛛 🖻 🔂 Ø	(0)								
Next actions form CSF care page	kage Subject Details								
Sections 1. Actions Taken O indicates completed section	Find Subject First Names* Last Names	Phan 🆓						9. Click the green '	Finis
			Next action	ns					
	Next action	Assigned to	Reason	Note	Priority	Status			
	No Further Action				1	Proposed	Ø	0	
							≩ ∧d	dd	

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**

<u>Note</u> that bulk allocation/de-allocation cannot be used for first time allocations or for deallocating 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

🗖 😼 🍕 Fiona Mackay-Kabir	
Allocatio Show team workview	S 🖘
Recently vieweu	2
Current Work	S 🖅

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

🗖 🎭 🐻 Fiona Mackay-Kabir	
CSSW Hampstead FIT 🔻	
▶ Team Summary	2
Current Work	S

🔲 🍓 🛃 Fiona Mackay-Kabir	mosaic
CSSW Hampstead FIT > Duty Worker Hampstead FIT +	
Allocations (2)	Quick Start
Current Work Bulk	Allocation
	Person

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.**

A. 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

System 2 System 2		
> Allocations (2)	🖙 🔁	Quick Start
Bulk Action		
Show 15 💙 entries	Search:	
Person	\$	□ ≎
Test Test (2075012)		
Ella Test (2186398)		
Showing 1 to 2 of 2 entries	First Previous	1 Next Last
Team Worker# Please Select	✓ □ Show workers in sub-teams	
Pass to Worker# Find	Clear	

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

ulk Action				
Show 15 🗸 e	ntries	Search:		
	Subject	\$	Block Reason	
Test Test				
Ella Test				
Showing 1 to 2 of	f 2 entries		First Previous 1 Next Last	
End	Reason Case transferred t		2 / 2 People will be realloca	

🗖 🎭 🙆 Fiona Mackay-Kabir	
CSSW Hampstead FIT 👌 Duty Worker Hampstead FIT 👻	
> Allocations	🖙 🏖
Current Work	🖙 🔁

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: <u>Verify/Check Case Allocation and De-allocation</u>.

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.

C	SSW Hampstead FIT 👌 Duty Worker Hampstead FIT	•	
A	llocations (2)		\$
• C	urrent Work		a
	1		
			· ·
ılk Ac			
how	15 V entries	Search:	
٥	Title	Subject	♦ □ ♦
4	Case note alert	Test Test	~
	Visit on 24/06/2021 at 14:00	Charlie Hill-McWillia	ms 🔽
¥	Placement Arrangement Meeting	Test Test	
<u>8</u>	Family Group Conference Referral	Test Test	
¥	Final Outcome of Section 47 Investigation	Test Test	
¥	IEYS Referrals	Test Test	
P	Placement Arrangement Meeting	Test Test	Z
1	Family Group Conference Referral	Test Test	
2	Second LAC Review	Test Test	
2	8 F I F I -	Test Test	
	Compliance Audit Alert		

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.**