

## Manager Mosaic Guidance

### Topics covered in this guide:

1. Allocations
2. Recently viewed
3. Current work folder
4. History
5. Documents and attachments
6. Assigning Reviews
7. Case Notes Search
8. Authorisation (Workflow)
9. Authorisation (Purchasing- Personal Budget)
10. Authorisation (Purchasing- Generic Budget)

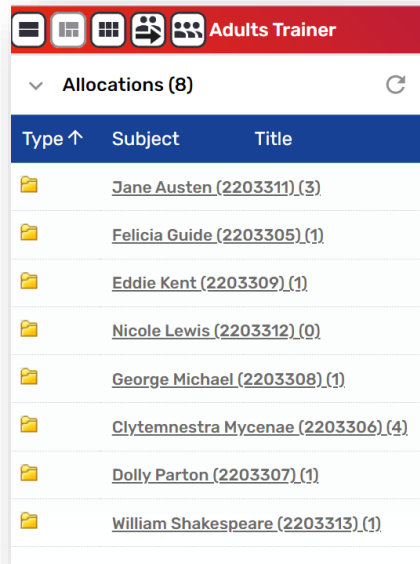


#### Other supporting guides on the Practice Guide

- [Teams on Mosaic](#)
- [Using a virtual worker act for](#)
- [Assigning workflow](#)

## 1. Allocations

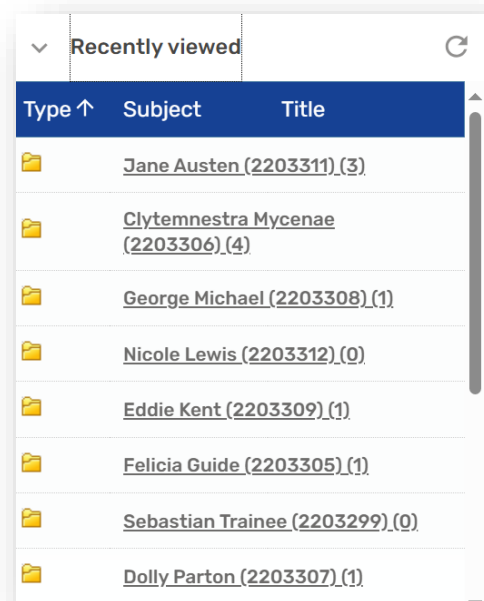
If you have put yourself as the allocated worker for a person (under Worker relationships), it will appear in your **Allocations** folder. The numbers appearing next to each person indicates how many workflows exist on the person’s file (current or future steps under ‘current work’).



Some managers choose to add their supervisee name as an involved worker, when allocating the case. Others expect the worker to do this themselves once informed of their allocation.

## 2. Recently viewed

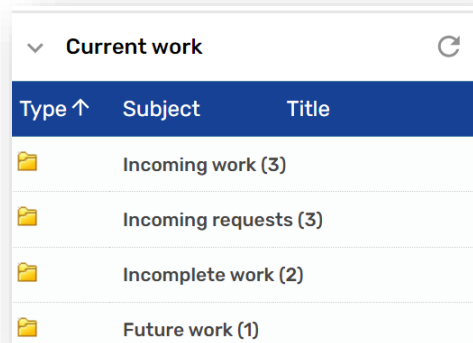
These are the last 10 or more people you have viewed on Mosaic.



### 3. Current Work folder

Your current work folder includes:

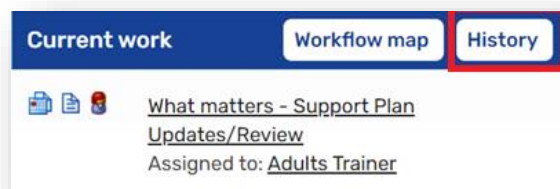
- **incoming work** (work you have not started)
- **incoming requests** (such as workflow authorisations)
- **incoming authorisations** (purchasing authorisations)
- **incomplete work** (work that you have started, but not finished)
- **future work** (work that is scheduled for the future).



### 4. History

If you want to check previous completed workflow on a person's record, this can be done through checking their history.

- On the person's record, click on **History**.



- Use the search box on the right by typing the name of the workflow to quickly search.

Forms and letters		Attachments		Documents shown for this person only			
Document	Category	Sub-category	Type	Subjects	Date	Step status	Actions
<a href="#">Support plan - Care Agency Information</a>	What Matters	What Matters	FORM	Nicole Lewis	29/11/2023 14:34:12	Completed	
<a href="#">Conversation follow up/feedback</a>	What Matters	What Matters	FORM	Nicole Lewis	29/11/2023 14:07:03	Completed	
<a href="#">What Matters - Building a good life</a>	What Matters	What Matters	FORM	Nicole Lewis	29/11/2023 14:07:02	Completed	
<a href="#">What matters - Help when you need it</a>	What Matters	What Matters	FORM	Nicole Lewis	29/11/2023 12:35:09	Completed	
<a href="#">Conversation follow up/feedback</a>	What Matters	What Matters	FORM	Nicole Lewis	29/11/2023 12:35:09	Completed	
<a href="#">What matters - Stay well and connected</a>	What Matters	What Matters	FORM	Nicole Lewis	29/11/2023 12:20:49	Completed	

## 5. Documents and Attachments

- To search for document or attachments, click on **Documents** on the person’s record.
- Search for workflow completed forms in **Forms and letters** or search for uploaded documents on **Attachments**, using the search box.

Forms and letters | Attachments

Documents shown for this person only

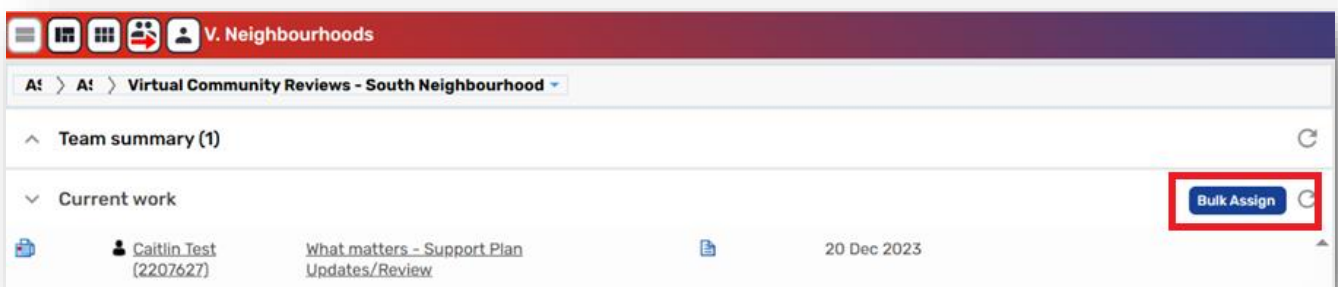
Show 15 entries Search:

Document	Category	Sub-category	Type	Subjects	Date	Step status	Actions
<a href="#">Support plan - Care Agency Information</a>	What Matters	What Matters	FORM	Nicole Lewis	29/11/2023 14:34:12	Completed	
<a href="#">Conversation follow up/feedback</a>	What Matters	What Matters	FORM	Nicole Lewis	29/11/2023 14:07:03	Completed	
<a href="#">What Matters - Building a good life</a>	What Matters	What Matters	FORM	Nicole Lewis	29/11/2023 14:07:02	Completed	
<a href="#">What matters - Help when you need it</a>	What Matters	What Matters	FORM	Nicole Lewis	29/11/2023 12:35:09	Completed	
<a href="#">Conversation follow up/feedback</a>	What Matters	What Matters	FORM	Nicole Lewis	29/11/2023 12:35:09	Completed	
<a href="#">What matters - Stay well and connected</a>	What Matters	What Matters	FORM	Nicole Lewis	29/11/2023 12:20:49	Completed	

## 6. Assigning workflows

To assign workflows, it is recommended to assign it through **full workview** so that it maintains the scheduled review date. *For a detailed guide listing the different ASC teams refer to [Teams on Mosaic guide on the Practice Guide](#).*

- Click on show full workview icon  at the top left of Mosaic to display the screen below.



V. Neighbourhoods

A! > A! > Virtual Community Reviews - South Neighbourhood

Team summary (1)

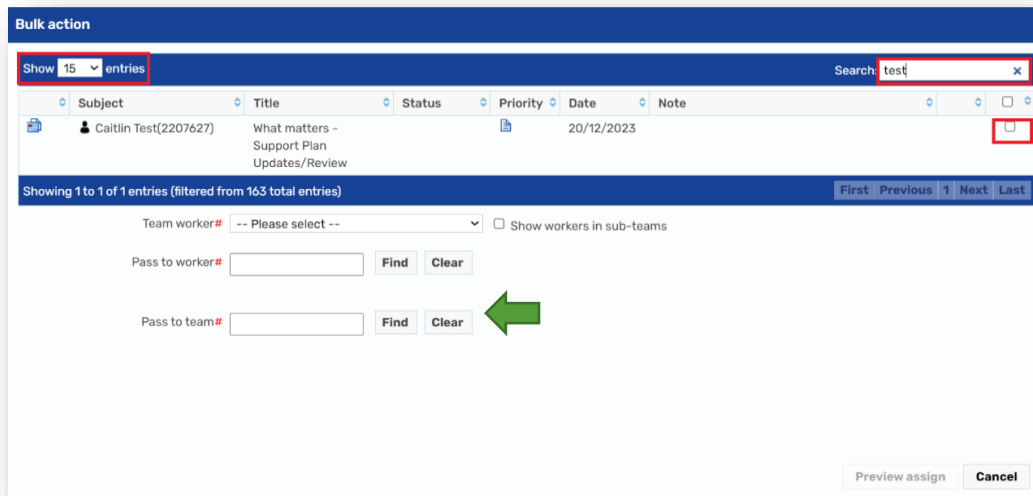
Current work

**Bulk Assign**

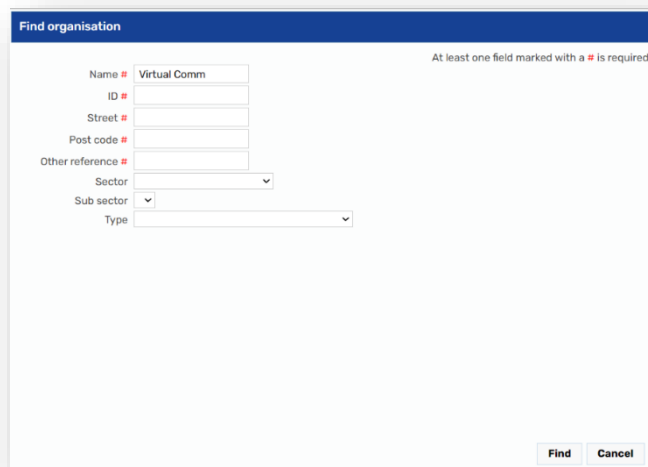
Caitlin Test (2207627) | What matters - Support Plan Updates/Review | 20 Dec 2023

- In the Current work folder, select **Bulk Assign**.

- The Bulk action box will be displayed.



- To reassign the workflow to a team folder, click on the tick box on the right next to the correct person/ workflow step (circled above).
- In **Pass to team**, click Find to search (arrowed above).
- In the Name section, type the first couple of words in the box. For example searching for a neighbourhood team folder, type 'virtual comm'.



- Mosaic displays the results below for 'Virtual comm':

**Find organisation results**

**Searched for:** Name: **virtual comm**

ID	Name	Address
<a href="#">7504297</a>	<a href="#">Virtual Community Reviews - Central Neighbourhood</a>	<a href="#">5 Pancras Square London N1C 4AG</a>
<a href="#">7504294</a>	<a href="#">Virtual Community Reviews - North Neighbourhood</a>	<a href="#">5 Pancras Square London N1C 4AG</a>
<a href="#">7504282</a>	<a href="#">Virtual Community Reviews - North/East Neighbourhood</a>	<a href="#">5 Pancras Square London N1C 4AG</a>
<a href="#">7504285</a>	<a href="#">Virtual Community Reviews - South Neighbourhood</a>	<a href="#">5 Pancras Square London N1C 4AG</a>
<a href="#">7504288</a>	<a href="#">Virtual Community Reviews - West Neighbourhood</a>	<a href="#">5 Pancras Square London N1C 4AG</a>

Showing 1 to 5 of 5 entries


First Previous 1 Next Last

- Click on the relevant team you require, and select ok.

To return back to your main view, select show **narrow workview** icon



### Tip – Bulk action

- To display more entries, click on the left arrow  and select from the options 25, 50, 100 or All.
- To search for a specific person, type their name in the search box on the top right.

## 7. Case Notes (search)

In some instances, there are a high number of case notes on a record, which would prove time consuming if you wished to find a specific one. The **Find case note** option at the bottom of the case note list is a helpful search tool:

Case notes - Jane Austen (2203311) born 18 Sep 1956 (67 years old)

Title	Type	Contact date	Created by	Team	Appendices
<a href="#">Assessment</a>	Placement Visit	19/05/2023	Adults Trainer	HASC	0
<a href="#">T/C to Ms Austen</a>	Telephone Contact	18/05/2023	Adults Trainer	HASC	0
<a href="#">Record or meeting</a>	Other	18/05/2023	Adults Trainer	HASC	1

Print multiple case notes **Find case note** Show related people View Add OK

- Once you have clicked **Find case note**, the search box is displayed for you to add the keyword(s) and **Find** it.

Find case notes

Keyword(s) in title

You can use % for wildcard matching, e.g. *concern%* will find *concern*, *concerned*, *concerns*.

Case note date range  
 From date  To date

Type

Entered by

Include case notes of related people

**Find** Cancel

## 8. Authorisation: Workflow

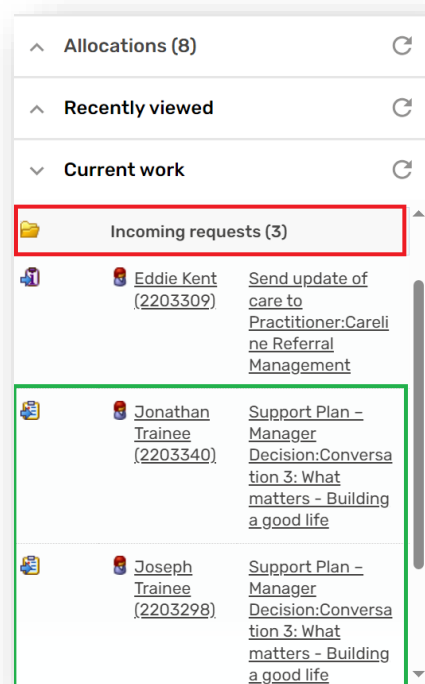
There two types of authorisations requests that a worker will send to a manager to authorise. They are workflow authorisations and purchasing authorisations (purchasing is explained in section 9 and 10).

### Some of the workflows you will be authorising include:

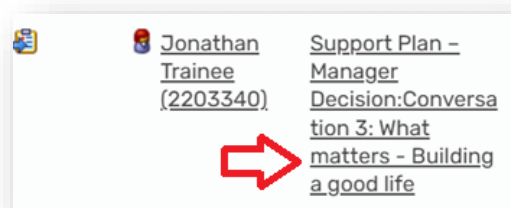
- Conversation 2: What matters- Help when you need it
- Conversation 3: What matters - Building a good life
- What Matters- Support Plan Updates/ Review
- Safeguarding Adults - S42(1) Information Gathering
- Safeguarding Adults – S42(2) Enquiry
- Mental Capacity Assessment

Note, authorising SG workflow is explained in detail in the SG Mosaic guidance on the Practice Guide. Please access these if you require more information.

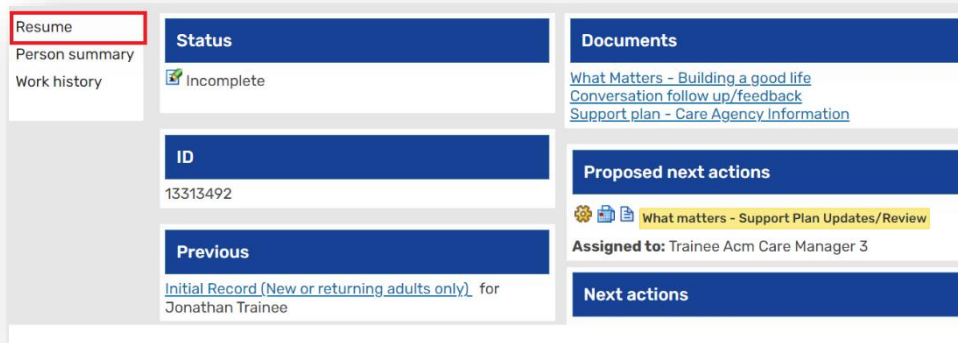
The workflow authorisation request will appear in your **Current work** folder under **Incoming requests**:



- Click on **Support Plan Manager Decision...** next to the person's name.




- Select **Resume** on your top left to take you to the workflow.



The screenshot shows a user profile interface. On the left, there is a navigation menu with 'Resume' highlighted by a red rectangular box. Other menu items include 'Person summary' and 'Work history'. The main content area is divided into several sections:
 

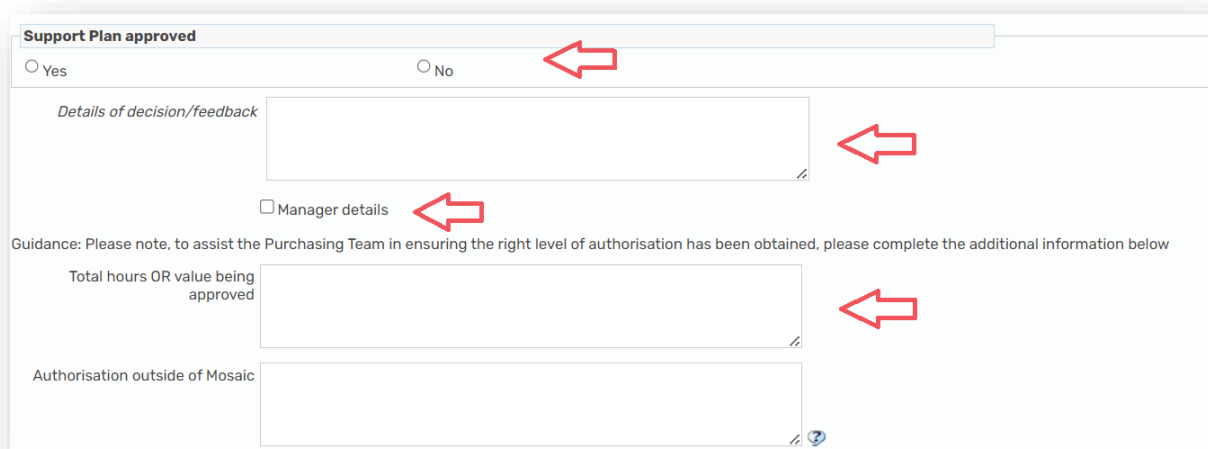
- Status:** Shows 'Incomplete' with a green checkmark icon.
- ID:** Displays the number '13313492'.
- Previous:** Contains a link for 'Initial Record (New or returning adults only) for Jonathan Trainee'.
- Documents:** Lists three documents: 'What Matters - Building a good life', 'Conversation follow up/feedback', and 'Support plan - Care Agency Information'.
- Proposed next actions:** Shows a task 'What matters - Support Plan Updates/Review' with a gear icon.
- Assigned to:** Lists 'Trainee Acm Care Manager 3'.
- Next actions:** A section header at the bottom.

- Read all the sections of the workflow.

In **Conversation 2**, **Conversations 3**, and **Support Plan Updates/Review**, you will need to complete **both** the manager section and the workflow task using the Requests icon  .

The manager section in **Conversation 2** and **Conversation 3** is in Section 5 of the form. The manager section in **Support Plan Updates/Review** is in Section 6 of the form.

- Complete the manager section below:



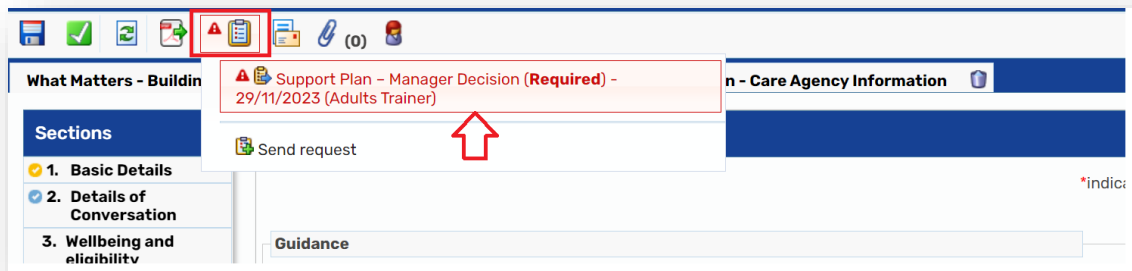
The screenshot shows the 'Support Plan approved' form. At the top, there are radio buttons for 'Yes' and 'No', with a red arrow pointing to the 'No' option. Below this is a large text area labeled 'Details of decision/feedback', with a red arrow pointing to it. Underneath is a checkbox for 'Manager details', also with a red arrow pointing to it. A guidance note reads: 'Please note, to assist the Purchasing Team in ensuring the right level of authorisation has been obtained, please complete the additional information below'. There are two more text areas: 'Total hours OR value being approved' and 'Authorisation outside of Mosaic', both with red arrows pointing to them.

Remember, you are often authorising both the quality of the practice/ assessment (*Details of decision/ feedback*) and the support requested/ budget (*total hours/ value being approved*).

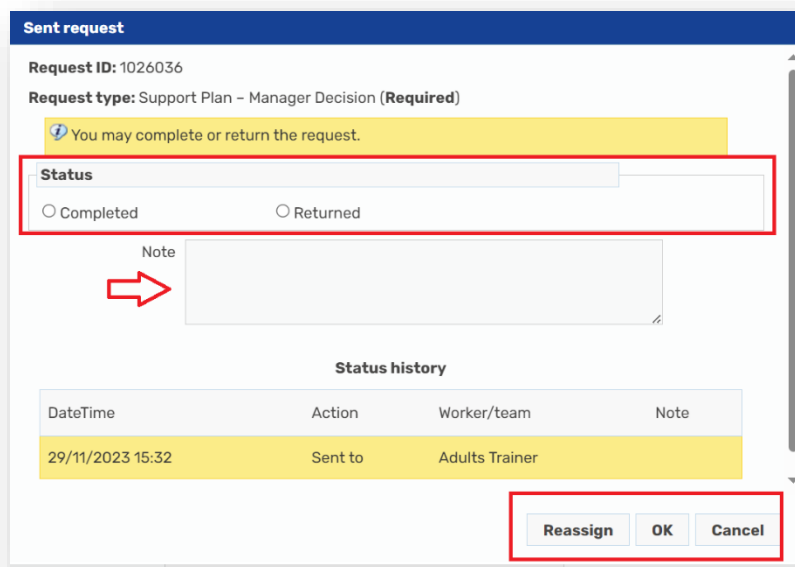
The text box underneath this, *Authorisation outside of Mosaic*, is for workers to complete on behalf of their manager (often on Duty, where an urgent amendment to a care plan is required). Here, they can copy and paste your authorisation (the Purchasing team won't proceed unless they have seen an authorisation in the workflow, and your authorisation case note).



- Next, you need to authorise the task that was sent to you by the worker. Click on the Requests icon (clipboard), and select **Support Plan – Manager Decision** which will be red and waiting for you to action.



- The **Sent request** box below will appear:



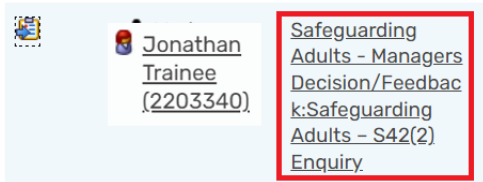
- If you are ready to authorise, select **Completed**, add a note and select **Ok**.
- If you want to return the task back to the worker, as further actions are required before you can authorise, (they may need to add more information etc), then choose **Returned**, add a note and select **Ok**.

By returning this task, the worker will need to send another task to you (once their actions have been completed), for authorisation again. The worker cannot finish the workflow step until this has been authorised.



**Tip – Workflow Authorisation**

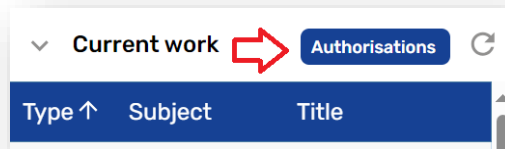
- Any workflow that is in your folder for authorisation, always click on the title of the task next to the person’s name, to take you to the **Resume** section to authorise. This is the quickest way to take you to the relevant step for authorisation.



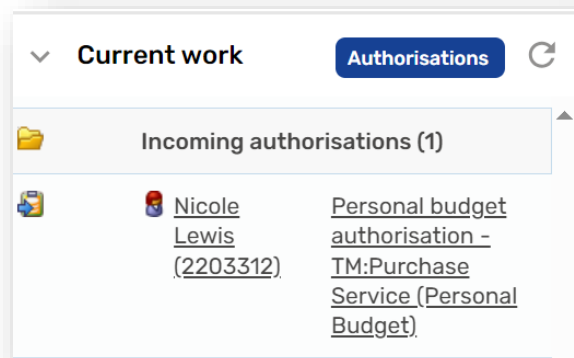
## 9. Authorisation: Purchasing- Personal Budget

The main service/ budget (in a *purchase service (personal budget)* step) that you will be authorising will usually be a direct payment.

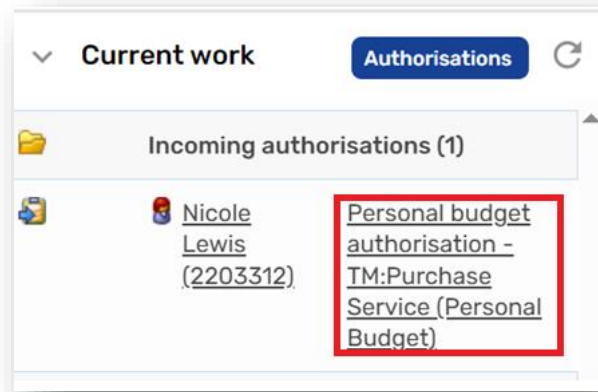
When you are sent a purchasing step to authorise, it will appear in your **Current work** with **Authorisations** next to it.



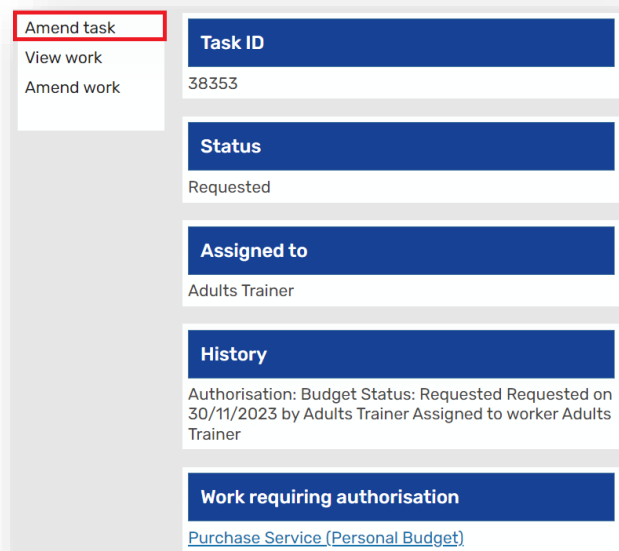
- In your **Current work** scroll down to **Incoming authorisations** and it will display how many purchasing authorisations have been sent to you:



- Click on **Personal budget authorisation** and the screen below will be displayed.



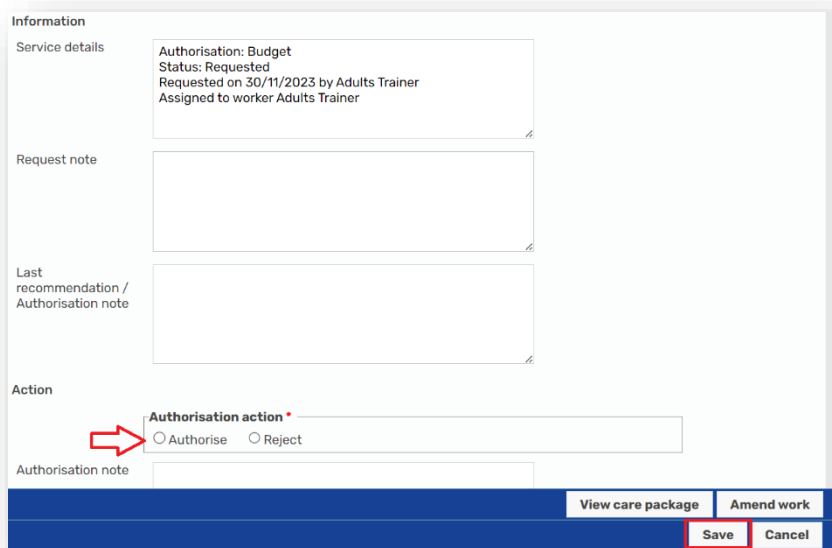
- Select **Amend task** on the top left and it takes you to **Authorisation task actions**.



- Check both the budget that has been set, and the cost of the service the worker has proposed, by checking the **Budget and costs** tab.

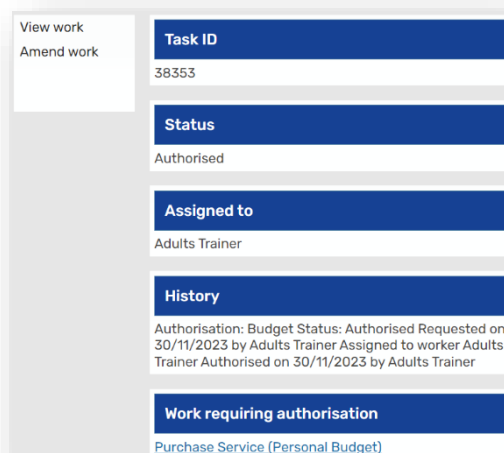
Budget and costs		Authorisation					
<p>Budget period: 18/05/2023 - 17/05/2024            Proposed net budget change for the period / £: 400.00</p>							
<b>Budget for period</b>							
Budget type	From	To	Av. per week / £	Total / £			
Indicative budget allocation	18/05/2023	17/05/2024	£253.26	£13,241.88			
➕ One-off increase	04/12/2023	04/12/2023	£7.65	£400.00			
<b>Total budget for Period / £</b>			<b>260.91</b>	<b>13,641.88</b>			
<b>Contributions for period</b>							
Contribution type	From	To	Av. per week / £	Total / £			
<b>Total contributions for Period / £</b>			<b>0.00</b>	<b>0.00</b>			
<b>Allocated spending for period</b>							
Provision	From	To	Outcome(s)	Quantity	Freq.	Av. per week / £	Total / £
LBC Direct Payments Scheme - DP - Agency Rate	18/05/2023	17/05/2024		14.00 Hour	Weekly	£234.22	£12,246.36
<b>Total allocated spend for period / £</b>						<b>12,246.36</b>	<b>12,246.36</b>
<b>Unallocated balance / £</b>						<b>1,395.52</b>	<b>1,395.52</b>

- You should be checking the budget matches what was agreed (circled under 'Budget for period'). One off or weekly increases the worker has made to the budget will appear here also, and this should be accurate.
- You should then be checking the actual funds spent/ service cost the worker has put on (circled under 'Allocated spending for period'). This should match what services have been agreed at the exact cost.
- To authorise, click on the **Authorisation** tab.
- Read the request note from the worker, and then scroll down to **Authorisation action**.



- Select **Authorise** and the select **Save**. The budget has now been authorised.

You will see the **Status** is authorised for example as below.

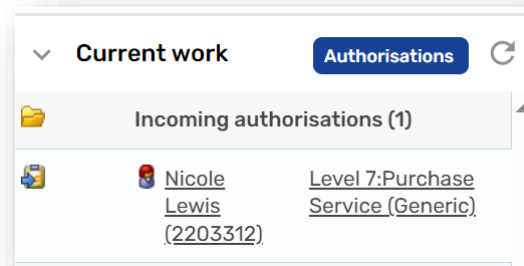


To exit this section, you can select 'Home' or simply click on another person/ file.

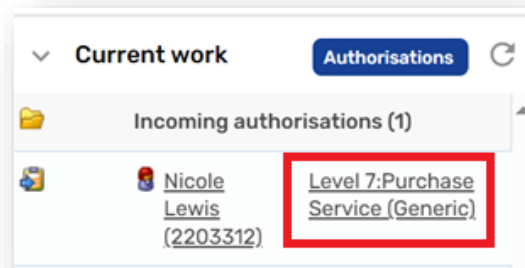
## 10. Authorisation: Purchasing- Generic Budget

The main service you will be authorising from a *purchase service (generic)* step will usually be a deep clean.

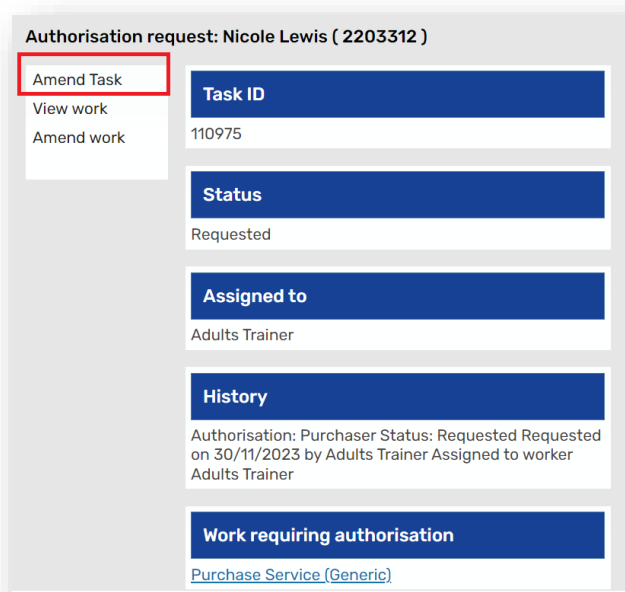
In your **Current work** scroll down to **Incoming authorisations** and it will display how many purchasing authorisations is awaiting authorisations.



- Click on **Purchase Service (Generic)** next to the person's name.



- The screen below will be displayed. Click on **Amend Task** on the top left.



- Check the costs, and on the **This Authorisation** tab, select **Authorise** and then **Save**.

Nicole Lewis (2203312) - Authorisation Task Actions

Care Package Level 7

**Net Costs for Service User (guide only based on current averages)**

	This Care Package	Already Purchased - All Care	Proposed Changes - All Care
<b>Max Per Week</b>	£0.00	£0.00	£334.60
<b>One Off</b>	£1,000.00	£0.00	£1,000.00
<b>This Year</b>	£1,000.00	£0.00	£6,879.40
<b>Next Year</b>	£0.00	£0.00	£17,447.00

View care package   Amend work

**This Authorisation**   Details   Request Note   Authorisation Note   Authorisation History

**Authorisation Action**

Authorise    Reject

Reason

**Save**   Cancel

- You will see the **Status** is authorised, for example as below:

**Authorisation request: Nicole Lewis ( 2203312 )**

View work  
Amend work

**Task ID**  
110975

**Status**  
Authorised

**Assigned to**  
Adults Trainer

**History**  
Authorisation: Purchaser Status: Authorised Requested on 30/11/2023 by Adults Trainer Assigned to worker Adults Trainer Authorised on 30/11/2023 by Adults Trainer

**Work requiring authorisation**  
[Purchase Service \(Generic\)](#)

To exit this section, you can select 'Home' or simply click on another person/ file.