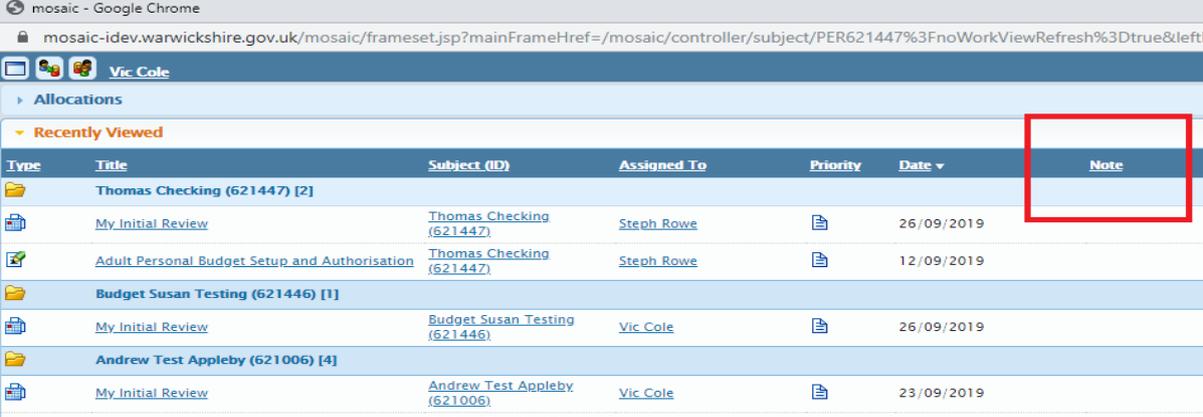


## Mosaic Full Workview Note

When teams/practitioners are working from their Mosaic Trays, you have a list of customers. To support quickly understanding the nature of incoming cases on Trays such as the Allocation Tray, there is the section 'Note'.



Type	Title	Subject (ID)	Assigned To	Priority	Date	Note
<b>Thomas Checking (621447) [2]</b>						
My Initial Review		Thomas Checking (621447)	Steph Rowe		26/09/2019	
Adult Personal Budget Setup and Authorisation		Thomas Checking (621447)	Steph Rowe		12/09/2019	
<b>Budget Susan Testing (621446) [1]</b>						
My Initial Review		Budget Susan Testing (621446)	Vic Cole		26/09/2019	
<b>Andrew Test Appleby (621006) [4]</b>						
My Initial Review		Andrew Test Appleby (621006)	Vic Cole		23/09/2019	

**Reason for this:** Currently Mosaic does not have the option for the notes added in the notes field to pull through (i.e. automatically populate when you reassign this step to another work tray), for example, to the Allocation tray, to Office Cover or to the Practitioner's own tray.

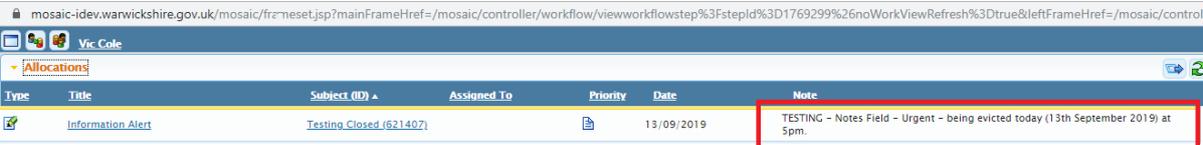
This means that **when you reassign the step, the notes added previously are lost.**

The E2E project will return to this after go live, but potentially this requires Corelogic/Servelec support.

### What to do now:

- The person reassigning the step **MUST** copy and paste previous notes into the next notes field with their updates, **before** they reassign the step.
- This is the responsibility of the person reassigning.

How to do this:

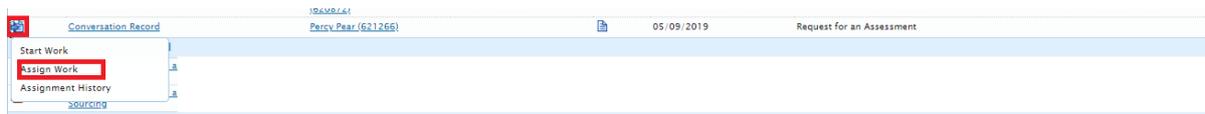


Type	Title	Subject (ID)	Assigned To	Priority	Date	Note
Information Alert		Testing_Closed_(621407)			13/09/2019	TESTING - Notes Field - Urgent - being evicted today (13th September 2019) at 5pm.

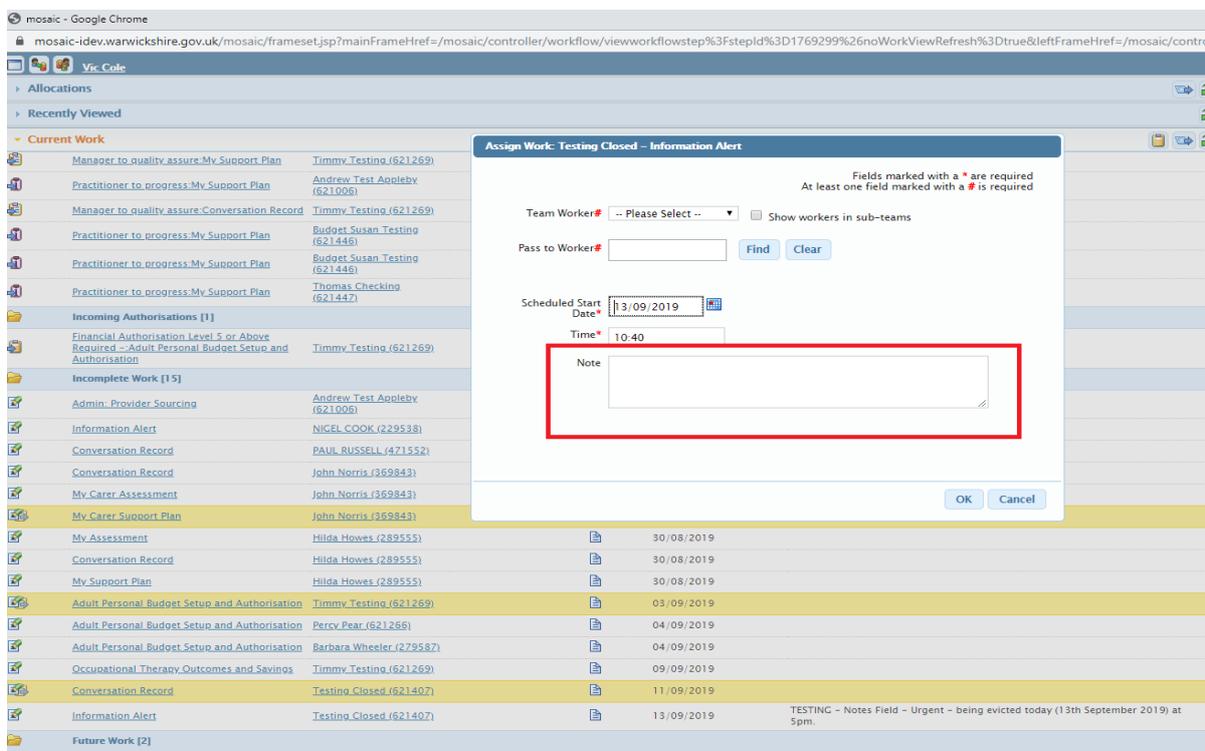
- Copy the note.

When reassigning the work step you will:

- Use the cog
- Select Assign Work.



▲ **Important** - You will notice that the information in the notes field has disappeared.



This is where you will paste the information and then add your updates before reassigning it.

- Use 'Find' to assign to where you want to send the step,
- Paste the previous notes and add your note (if applicable) into the note field
- Click 'OK'.

▲ **Important** - The **first 80 characters** of this information will show in the workstep once you have reassigned it.



To read the **full Note information** you must

- Left Click the cog
- Click Assignment History

Information Alert	Testing Closed (621407)	Kelly Nowell	13/09/2019	TESTING - Notes Field - Urgent - being evicted today (13th September 2019) at 5pm. Kelly please visi...
Assignment History	Setup and Authorisation	Testing Closed (621407)	Sarah Blakely	11/09/2019

mosaic - Google Chrome

mosaic-idev.warwickshire.gov.uk/mosaic/frameset.jsp?mainFrameHref=/mosaic/controller/subject/PER621466%3FnoWorkViewRefresh%3Dtrue&leftFrameHref=/mosaic/controller/workview/%3FworkViewState%

Kelly Nowell

Allocations (1)

Recently Viewed

Type	Title	Subject ID	Assigned To
	Testing James (621466) [2]		
	My Initial Review	Testing James (621466)	Kel
	My Support Plan	Testing James (621466)	Kel
	Ha-Yun Jeong (620895) [5]		
	Conversation Record	Ha-Yun Jeong (620895)	Vic
	My Initial Review	Ha-Yun Jeong (620895)	Adi
	Conversation Record	Ha-Yun Jeong (620895)	Wa
	Information Alert	Ha-Yun Jeong (620895)	PD
	Adult Safeguarding Concern Decision Making	Ha-Yun Jeong (620895)	SAS
	Testing Closed (621407) [4]		
	My Initial Review	Testing Closed (621407)	Sar
	Information Alert	Testing Closed (621407)	Kel
	Adult Personal Budget Setup and Authorisation	Testing Closed (621407)	Sar
	Conversation Record	Testing Closed (621407)	Vic
	Thomas Checkino (621447) [2]		
	Budget Susan Testing (621449) [1]		
	Andrew Test Aonleby (621008) [4]		
	Test Hughes (621366) [3]		

**Assignment history: Testing Closed - Information Alert**

Assigned to Kelly Nowell (110003171) by Vic Cole (110003067) on 13/09/2019 at 10:51

Assignment note: TESTING - Notes Field - Urgent - being evicted today (13th September 2019) at 5pm. Kelly please visit TODAY / 13th September 2019 at 11am. Vic

Assigned to Vic Cole (110003067) by Vic Cole (110003067) on 13/09/2019 at 10:27

Assignment note: TESTING - Notes Field - Urgent - being evicted today (13th September 2019) at 5pm.

Assigned to Vic Cole (110003067) by Vic Cole (110003067) on 13/09/2019 at 10:23

OK

Alternatively you can check the Notes on Assignment History:

- Go to the Assignment Details and click the History button.

**Conversation Record: Percy Pear (621266)**

Start  
Person Summary  
Work History

**Status**

Not Yet Started

**ID**

1768406

**Previous**

[My Initial Review](#) for Percy Pear

**Assignment Details**

Assigned To: [Warwick OP Allocation](#)

Note: Request for an Assessment. Please see [Allocation list](#).

**Progress Details**

Scheduled For: 05/09/2019

Last Updated By: [Karrie Ann Webb](#) on 05/09/2019 10:22

The history will then appear.

**Conversation Record: Percy Pear (621266)**

Start  
Person Summary  
Work History

**Status**  
Not Yet Started

**ID**  
1768406

**Previous**  
[My Initial Review](#) for Percy Pear

**Assignment Details**  
Assigned To: [Warwick OP Allocation](#) | [History](#)  
Note: Request for an Assessment. Placed on Allocation list

**Progress Details**  
Scheduled For: 05/09/2019  
Last Updated By: [Karrie Ann Webb](#) on 05/09/2019 10:22

**History - ID:1768406**

ID: 1768406  
Type: Conversation Record

**Assignment History**

Date/Time	Worker/Team	Note
05/09/2019 11:07	Warwick OP Allocation by Karrie Ann Webb acting for Warwick OP Team Leader	Request for an Assessment. Placed on Allocation list.
05/09/2019 10:22	Warwick OP Team Leader by Karrie Ann Webb	Request for an Assessment

mosaic - Google Chrome

mosaic-idev.warwickshire.gov.uk/mosaic/frameSet.jsp?mainFrameHref=/mosaic/controller/workflow/viewworkflowstep%3FstepId%3D1769299%26noWorkViewRefresh%3Dtrue&leftFrameHref=/mosaic/control

Visi Code

Allocations

Recently Viewed

Current Work

- Manager to quality assure My Support Plan - Timmy Testino (621269)
- Practitioner to progress My Support Plan - Andrew Test Appleby (621006)
- Manager to quality assure Conversation Record - Timmy Testino (621269)
- Practitioner to progress My Support Plan - Budget Susan Testino (621436)
- Practitioner to progress My Support Plan - Budget Susan Testino (621436)
- Practitioner to progress My Support Plan - Thomas Checking (621447)

Incoming Authorisations (1)

- Financial Authorisation Level 5 or Above Required - Adult Personal Budget Setup and Authorisation - Timmy Testino (621269)

Incomplete Work (15)

- Admin - Provider Sourcing - Andrew Test Appleby (621006)
- Information Alert - NIGEL COOK (229538)
- Conversation Record - PAUL RUSSELL (471552)
- Conversation Record - John Norris (369843)
- My Carer Assessment - John Norris (369843)
- My Carer Support Plan - John Norris (369843)
- My Assessment - Hilda Howes (289555)
- Conversation Record - Hilda Howes (289555)
- My Support Plan - Hilda Howes (289555)
- Adult Personal Budget Setup and Authorisation - Timmy Testino (621269)
- Adult Personal Budget Setup and Authorisation - Percy Pear (621266)
- Adult Personal Budget Setup and Authorisation - Barbara Wheeler (279587)
- Occupational Therapy Outcomes and Savings - Timmy Testino (621269)
- Conversation Record - Testino Closed (621407)
- Information Alert - Testino Closed (621407)

Future Work (2)

**Assign Work: Testing Closed - Information Alert**

Fields marked with a \* are required  
At least one field marked with a # is required

Team Worker#   Show workers in sub-teams

Pass to Worker#

Scheduled Start Date\*

Time\*

Note