Adults Quick Guide

Internal Contacts – Referring to OT or SW

This guide is intended for LCC practitioners only.

It is for cases which require intervention from both Adult Care Social Work (SW) and Occupational Therapy (OT) or where one service feels the need to refer the case to the other.

The need for both service areas / the other service area to be involved could be identified at any point during case management activity.

OT and SW have separate workflows and use different workflow steps, they will therefore not be able to joint work cases by recording in the same steps.

SW referring to OT (New Cases only – not already open to OT)

If the need to refer to the OT is identified by SW the following process applies:

- A next action of **Adult Internal Contact (assign to self)** should be selected and assigned to self for completion using the **Assign to Me** button. (Tick the **'send immediately'** checkbox to send this before finishing your current workflow step).

- Complete the **Adult Internal Contact** and assign a next action of **Adult OT Conversation Record** to the Adult **OT Duty team** for screening by the OT duty worker.

  A note should also be added when adding this action stating where the person lives and a brief summary of the type of assistance required.

- The OT duty worker will make direct contact with the 'referrer' to assess the urgency of the referral.

- If the case requires allocation, the OT manager (of the relevant OT team) opens a relevant worker involvement and assigns the appropriate workflow step (next action from the Adult OT Conversation Record) to the allocated worker.

The 'Relationship type' should be **Key Worker (Adult Care)** if the OT is the only worker involved or **Occupational Therapist / Occupational Therapist CCO** if there is already a key worker.

The OT team should also be recorded as an **Organisational relationship** of **Key Team (Adult Care)** if the OT team is the only team involved or **Involved Team** if there is already a key team open.

- The OT will progress the case using a separate workflow as required

Open Cases – Cases already open to OT

If additional information is received and the case is already open to OT the Internal Contact should **not** be used.

Instead, complete an **Adult Contact (Additional Information)** within Mosaic.

This is a workflow step available from the Start > New… sidebar menu. From this workflow step, the next action **Adult Additional Information Received** should be assigned to the **Adult OT Duty** team

OT referring to SW (New Cases only – not already open to SW)

If the need to refer to SW is identified by OT the following process applies:

- A next action of **Adult Internal Contact (assign to self)** should be selected and assigned to self for completion using the **Assign to Me** button (Tick the **'send immediately'** checkbox to send this before finishing your current workflow step).

- Complete the **Adult Internal Contact** and assign a next action of **Adult Conversation Record** to the relevant **Adult Care team** (based on where the person lives) for screening by the SW duty/triage/dedicated worker.

  A note should also be added when adding this action stating where the person lives and a brief summary of the type of assistance required.

- The SW duty/triage/dedicated worker will make direct contact with the 'referrer' to assess the urgency of the referral

- If the case requires allocation, the SW manager opens a relevant worker involvement and assigns the appropriate workflow step (next action from the Adult Conversation Record) to the allocated worker.

> The 'Relationship type' should be **Key Worker (Adult Care)** if the SW is the only worker involved or **Involved Worker** if there is already a key worker.
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> The SW team should also be recorded as an **Organisational relationship** of **Key Team (Adult Care)** if the SW team is the only / main team involved or **Involved Team** if there is already a key team open.

- The SW will progress the case using a separate workflow as required

> **Open Cases – Cases already open to SW**
>
> If additional information is received and the case is already open to SW the Internal Contact should **not** be used.
>
> Instead, complete an **Adult Contact (Additional Information)** within Mosaic.
>
> This is a workflow step available from the Start > New … sidebar menu. From this workflow step, the next action **Adult Additional Information Received** should be assigned to the relevant **Adult Care** team