

## Adults Quick Guide

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### Adult OT Casework Record

The **OT Casework Record** should be used instead of Case notes for the recording of OT information for all cases.

It should be used to record details of all visits, telephone calls, emails, letters etc, along with brief details of any equipment ordered during this period of OT intervention. Full details of equipment trialled must be recorded within the **OT Goals and Action Plan**. See **OT Goals and Action Plan** user guide for further details.

Case notes can still be recorded to highlight significant information recorded within the **OT Casework Record** and when an 'alert' needs to be sent to another worker, but you should not duplicate information.

If the case progresses beyond the initial OT conversation (duty process) then an **OT Casework Record** should be added as a next action from the **OT Conversation Record** step. The duty worker will do this unless there is already an **OT Casework Record** open on the person's record.


Only one **OT Casework Record** should be added per OT intervention period, so it should only be finished once all current OT work is complete – the **OT Casework Record** will therefore remain open for cases awaiting a DFG / Adaptation.

If there is already an **OT Casework Record** showing in Current work the duty worker will not add a new one from the **OT Conversation Record**, instead you (the allocated worker) will need to reassign this step to yourself from the relevant Team inbox e.g. Inbox (DFG)\*




If previously forgotten, or finished prematurely, the **OT Casework Record** can be added as a 'send immediately' next action later in the OT process, i.e. as a next action from the **OT Specialist Assessment**, but it is very important you only do this if the **OT Casework Record** is missing from the Current work.

For cases only open for a future **Moving and Handling Review**, the current **OT Casework Record** should be finished and a new one added as a 'send immediately' next action from the Review step when the review is due.

### To add the OT Casework Record from a workflow step:

- Click into **Next actions** (last section of the form)
- Add the action **OT Casework Record** – tick the **Send Immediately?** checkbox (where possible) and assign as appropriate (to self using the **Assign to Me** button, or to the relevant Team inbox or worker using the Pass to worker > **Find** button)
- Finish the **OT Conversation Record** or exit the workflow step (assessment/review) using the **Close** icon  – make sure you click **Yes** to save the changes
- The **OT Casework Record** will now appear as **Incoming work** within **Current work** on the **Person summary**

### \*To reassign the OT Casework Record from a Team inbox:

- Access the **Team workview** by clicking the **Show team workview** icon 
- In the **Team summary** click the name hyperlink for the relevant Team inbox (usually Inbox DFG)
- Access the **Incomplete work** folder in **Current work** for the inbox
- Click the **Incomplete work** icon  to the left of the **OT Casework Record** – this will look like a **yellow cog**  when you hover over it
- Click **Update assignment** from the mini menu
- In the Team worker dropdown menu select your **name**
- Click **OK** button – the **OT Casework Record** will then be assigned to you and move to your **Incomplete work** folder

# Recording the Adult OT Casework Record


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To start the **OT Casework Record** step, from within the person's record:


- Click the **Incoming work** icon  within **Current work** on the **Person summary** screen
- Click **Start work** from the menu



The **OT Casework Record** will open in a separate window

## Tips for completing the form

Click the **Save** icon  throughout your recording in the form. It is recommended that you save your work at least at the end of each section, but the more often the better. Once you click save, any mandatory fields will be highlighted in red.

## Section 1. Personal Details

Information will prepopulate into the fields marked with the **blue cog** . If some information is missing or incorrect, it can be added or edited by:

- clicking the **Show subject summary** icon  to minimise the workflow step window
- editing the information on the **Person summary** screen (user guides on updating the person's details can be found on the **Mosaic Hub**)
- maximising the workflow step window and clicking the **Refresh current form** icon  to update the information in these fields


## Section 2. Casework Record Activity

This section is used to record details of all activity e.g. telephone calls, emails, visits etc. It should be updated throughout the period of OT intervention and should provide an accurate, up to date chronological record of all OT activity.

To log activity:

- Click the **Add** button


An **Activity** popup window will open:

- **Date / Time** = Record the date and time the activity took place (not the date and time you are recording the entry) using the **date and time picker** icon  (The 'Now' button can be used to record current date and time but only if applicable)
- **Activity** = Select the relevant type of activity from the dropdown menu
- **Details** = Record details of the activity i.e. details of the visit, telephone call etc
- **Worker Recording Activity** = Prepopulates with the details of the worker recording the entry – this can be over typed if recorded on behalf of someone else
- Click the **Add** button to record additional activity, or click the **Add and close** button if only recording one row of activity or when all current activity has been recorded

If activity is recorded the following icons are displayed:


 **Edit** – to edit/amend a row of activity

 **Delete** – to delete/remove a row of activity


 **Move this row up** – to rearrange the order of the activity logged (only displays if more than one row of activity is recorded)

If you are unable to make contact with the person or carer to arrange the assessment, an '**unable to contact**' letter must be sent and the case closed if no response within 14 days (as per the detail in the letter).


**To open and complete the letter:**

- Click the **Forms and letters** icon 
- Select **OT Assessment Letter Unable to Contact** – this will open as a separate tab
- Complete the letter template – you can refer to the **Letter Templates** user guide for further guidance if needed

## To print the letter:

- While still in the letter template tab click the **Output current document** icon  - an 'Output Options' window will open
- You can amend the 'Output Options' if needed and then click **Output to PDF** – you can refer to the **Printing Documents** user guide if needed

## To request Business Support send a copy of the letter for you:

- Click the **Requests** icon 
- Select **Adult Admin output request**
- Add a **Note** with specific instructions e.g. where to post to etc
- Select **Adult Admin OT** from the Pass to team dropdown menu
- Click the **OK** button

## Section 3. Completion Details

This section will display the name of the worker who started the **OT Casework Record**. It can be overtyped to the person finishing the step if appropriate.

## Section 4. Next actions

A next action must be added before the **OT Casework Record** can be finished.


To record a next action:


- Click the **Add** button
- Select the relevant action from the **Select action** dropdown menu
- Assign to = Select/Find as appropriate - Not required for NFA actions
- Note = Record any necessary information
- Click the **Add** button if more than one next action is required or click the **Add and close** button if only adding one next action or once all actions are added


Action	When to use	Who to assign to
Adult OT Casework Record Complete (NFA)	At the end of the OT intervention period when all OT involvement is ending	This is a terminating (no further action) action, so does not need to be assigned
Adult OT Casework Record No Longer Required (NFA)	If the OT intervention is ending early	This is a terminating (no further action) action, so does not need to be assigned
Adult Proposed Case Closure	If a full case closure is required, e.g. the person does not have any open ongoing services or involvements  Refer to the <b>Case Closures – Full, Team and Involvement</b> user guide for further information	Self using the <b>Assign to Me</b> button
Adult Case Closure Already Started (NFA)	If a full case closure is required and is already underway.  To add this action, you must be able to see <b>Adult Proposed Case Closure</b> or <b>Adult Case Closure in Progress</b> within <b>Current work</b> on the <b>Person summary</b> screen	This is a terminating (no further action) action, so does not need to be assigned

## Toolbar Icons


While completing and before finishing the step you should always consider whether you need to use any of the toolbar icons at the top of the screen.

You should use the **View documents** icon  to attach relevant supporting documents created outside of Mosaic.

Remember, there are optional forms and letters you may need to complete e.g. the 'unable to contact' letter. These forms and letter templates are accessed via the **Forms and letters** icon .

There are requests and notifications available from the **Requests** icon  that you may need to send.

Request (R) / Notification (N)	When to use	Who to assign to
(N) Adult Admin output request	To be used to request Business Support generate a letter and post it out to the person/their representative etc  You must use the <b>Note</b> field to give specific details.	<b>Adult Admin OT</b> via Pass to team dropdown menu
(R) Adult Please action	This request appears in most workflow steps and can be used as and where required	A worker or team as appropriate by using the Find button



Clicking the **Finish** icon  will finish and complete your casework record. It should only be finished at the end of all current OT case activity. Once the **Finish** icon can be clicked, it will lock down your step and no further input can be made.

**Important:**

- The OT Casework Record should remain open as 'Incomplete work' until current OT case activity is complete
- If the case is transferring to another OT/CCO the OT Casework Record should be reassigned to them\*\*
- If the case is open and awaiting a DFG / Adaptation the OT Casework Record should be reassigned to the Team's Inbox (DFG)\*\*
- If the case is only remaining open for a future M&H review the current OT Casework Record should be finished and a new one will be added as a 'send immediately' next action from the review when it is due

The above points (excluding the last point) are also true for the **OT Goals and Action Plan**. Please refer to the **OT Goals and Action Plan** user guide for further details

**\*\*To reassign the OT Casework Record to another worker / Team inbox:**

- Exit the step using the **Close** icon  - Click **Yes** to save any changes
- Click the **Incomplete work** icon  to the left of the **OT Casework Record** in the **Current work** section
- Click **Update assignment** from the mini menu
- In the Team worker dropdown menu select the relevant named worker or Team inbox (usually DFG)
- Add a **Note** to highlight why the case is ongoing and the step is being reassigned
- Click **OK** button – the **OT Casework Record** will be reassigned to the worker / inbox

**Please note:** Alternatively the **OT Casework Record** can be assigned in 'bulk' i.e. at the same time as the **OT Goals and Action Plan**. Refer to the **Assigning Work** user guide for further details