

## Adults Quick Guide

---

### Moving and Handling Process

For all cases where moving and handling needs are identified a **Moving and Handling Assessment and Plan** should be completed. This workflow step is a next action from the **OT Specialist Assessment** or **OT Goals and Action Plan**

Following a Moving and Handling Assessment and Plan a **Moving and Handling Review** should only be scheduled for cases where it is necessary (See **Guidance for moving and handling reviews** for further practice guidance)

#### No review required

If a Moving and Handling Assessment and Plan is completed and no Moving and Handling Review is required, or for cases where a review is completed and no further Moving and Handling Review is required, the person (client) and care provider should be sent a letter informing them of how to contact the service in the future, along with a copy of the Moving and Handling Plan.

#### Review required

If it is determined that a Moving and Handling Review is required, the review should be assigned to the team's **Inbox (Moving and Handling)**, with clear clinical reasoning for the review documented in the Note box to allow the reviewer to see what is required.

Both the person (client) and care provider should be sent a letter detailing when the review is scheduled for, along with a copy of the Moving and Handling Plan.

## Review completed – change in need or circumstances

If a Moving and Handling Review is completed and there are any changes in the person's needs or circumstances an OT Specialist Assessment should be added as a next action from the review. Following the OT Specialist Assessment a new Moving and Handling Assessment and Plan can then be completed.

Or where a person's Moving and Handling Assessment and Plan require updating following a Moving and Handling Review a Moving and Handling Assessment and Plan can be added as a next action from the Moving and Handling Review.


## New contact - review scheduled

If a new contact (new referral) comes in for a case where a Moving and Handling Review has already been scheduled the Lead Practitioner (LP) will cancel the scheduled review when allocating the case to ensure only the correct workflows are available.

The case is then treated as new i.e. an OT Specialist Assessment will be carried out rather than the review being picked up.

## Letters

Remember for all cases where a **Moving and Handling Assessment and Plan** or **Moving and Handling Review** has been completed a copy of their **Moving and Handling Plan** along with the appropriate letters should be sent to the person (client) and care provider.

The letter templates are available within from the **Forms and letters** icon  within both the **Moving and Handling Assessment and Plan** and **Moving and Handling Review** steps.

- **Adult Moving and Handling Letter** – to be sent to the person with a copy of their Moving and Handling Plan.

Within the letter you can indicate whether a review is required and the scheduled date of review if there is one to be scheduled.

The letter will also explain that your involvement is ending and inform them of how to contact the service in the future/before the review is due, if needed.

- **Adult Moving and Handling Letter for Provider** – to be sent to the care provider with a copy of the person's Moving and Handling Plan.

Within the letter you can indicate whether a review is required and the scheduled date of review if there is one to be scheduled.

The letter will also explain that your involvement is ending and inform them of how to contact the service in the future/before the review is due, if needed.

## Recording the Adult Moving and Handling Assessment and Plan

---

To start the **Moving and Handling Assessment and Plan**, 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 **Moving and Handling Assessment and Plan** will open in a separate window


The **Adult Moving and Handling Assessment and Plan** is split into 6 different sections.

Each section should be completed with relevant information.


This guide will only cover tips for completing the form using icons and buttons.


All fields should be completed as comprehensively as possible based on the information gathered during assessment and planning process.



### Tips for completing the form

Clicking on the **Show guidance** icon  will give you prompts to assist in answering the associated question.


Click the **Section completed** checkbox at the end of each section to put a tick in the sections menu on the left. This will not lock the section down nor save the section. We recommend ticking 'Section completed' for the relevant sections of this form before finishing the step. There is an option to select 'completed sections only' when printing 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.

**Blue cogged**  fields prepopulate with the person's details. If some information is missing or incorrect, it can be 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

Click the **Find** button to search for and record the **Assessor Details**

Use the **date picker** icon  to record dates

Click the **Find** button to record details in the **Details of Other People Involved in the Moving and Handling Assessment** table


Click the **Add** button to record details in the **Moving and Handling Plan** table

When recording in any tables, click the **Add** button to record an additional row to the table or click the **Add and close** button if only recording one row, or when all rows have been recorded.

When rows have been recorded the following icons are displayed:

 **Edit** – to edit/amend a row in the table

 **Delete** – to delete/remove a row from the table

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

## Section 6. Next actions

Next actions are mandatory in all forms so at least one next action must be added before the **Moving and Handling Assessment and Plan** step can be finished.

**To record a next action:**

- Click the **Add** button
- Select the relevant action from the **Select action** dropdown menu
- Tick the **Send Immediately?** checkbox where necessary (only available for certain actions)
- Assign to = Select/Find as appropriate - Not required for NFA actions
- Reason = Select as appropriate from dropdown menu (only available for certain actions)
- Note = Record any necessary information – recommended when assigning a next action to another team/worker
- Priority = Select radio button as appropriate – use the **Note** field to explain why you have changed the Priority from Normal if you change it
- 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


Remember to tick the **Send Immediately?** checkbox to send relevant next actions before finishing the **Moving and Handling Assessment and Plan**


Next Action	When to use	Who to assign to
Adult Moving and Handling Review	For cases where a Moving and Handling Review is necessary.  Use the <b>Note</b> box to record clear clinical reasoning for the review.	The team's <b>Inbox (Moving and Handling)</b> using to Pass to worker > <b>Find</b> button  Type <b>%moving</b> in the 'Last Name' field to find the inbox
Adult OT Casework Record	To be used instead of case notes to record details of visits, telephone calls etc.  Only to be selected here if <b>not</b> already showing within <b>Current work</b> on the Person summary.	Self using the <b>Assign to Me</b> button


Next Action	When to use	Who to assign to
Adult OT Specialist Assessment	If it is decided a full and comprehensive assessment is required.	Self using the <b>Assign to Me</b> button  Or another worker using the Pass to worker > <b>Find</b> button
Adult Moving and Handling Complete (NFA)	For cases where no Moving and Handling Review is necessary.	This is a terminating (no further action) action, so does not need to be assigned.
Adult Disabled Facilities Grant Request – Private Property / Tenancy Only	If the person requires a DFG adaptation	Self using the <b>Assign to Me</b> button  Or another worker using the Pass to worker > <b>Find</b> button
Adult Adaptation - Other	If the person requires an adaptation for a council property, an adaptation funded by another agency or an adaptation funded by LCC	Self using the <b>Assign to Me</b> button  Or another worker using the Pass to worker > <b>Find</b> button
Adult OT Non-Contract Specials	If the person requires a non-contract special item of equipment	Self using the <b>Assign to Me</b> button
Adult Internal Contact (assign to self)	If the person needs involvement from Adult Care SW/CCO.  This should <b>only</b> be used for cases <b>not already open</b> to Adult Care SW/CCO.	Self using the <b>Assign to Me</b> button
Adult Proposed Case Closure	When it is decided the case does not need to open/remain open and a full case closure is required.  Please refer to the <b>Case Closures - Full, Team and Involvement</b> user guide for full details	Self using the <b>Assign to Me</b> button

Next Action	When to use	Who to assign to
Adult Case Closure Already Started (NFA)	<p>When a full case closure is required but it is already underway.</p> <p>You must be able to see <b>Adult Proposed Case Closure</b> or <b>Adult Case Closure in Progress</b> within Current work on the Person summary screen</p>	This is a terminating (no further action) action, so does not need to be assigned.

Before finishing the **Adult Moving and Handling Assessment and Plan** you should use the appropriate toolbar icons.

Remember you should always send a copy of the **Moving and Handling Plan** along with the appropriate letters to the person (client) and the care provider - these letters along with other optional forms and letters are accessed via the **Forms and letters** icon .


Any external documents should be attached to the step using the **View documents** icon .

The requests and notifications available from the **Requests** icon  should be used and sent as required

Request (R) / Notification (N)	When to use	Who to assign to
(N) Adult Admin output request	<p>To request Business Support generate a finished version of the M&amp;H plan and post it out, along with relevant letters to the person/their representative and the care provider.</p> <p>You must use the <b>Note</b> field to give specific details e.g. whether they need to post the assessment, plan or both.</p>	<b>Adult Admin OT</b> using the Pass to team dropdown menu

Request (R) / Notification (N)	When to use	Who to assign to
(R) Adult Please action	This appears in most workflow steps and can be used as and where required.	Another worker or team as appropriate by using the <b>Find</b> button
(R) Adult Please review information and authorise	Optional authorisation to be used as required.	Your manager / Level 2 OT using the Pass to worker > <b>Find</b> button

### To print the M&H assessment and / or plan:

- Click the **Output current document** icon  – an 'Output Options' window will open
- You should amend the 'Output Options' –


The **Next actions** section of your assessment will automatically appear on the output unless the 'Output Options' are amended before printing. This section should not be included on any outputs for the person or their representative.

If you only wish to print the plan you can choose just to print that section

- Click **Output to PDF** – you can refer to the **Printing Documents** user guide if needed


**Please note:** You should repeat this process to print any covering letters as necessary. Click into the letter tab at the top of the screen and then repeat the process as above

### To request Business Support send documents for you:

- Click the **Requests** icon 
- Select **Adult Admin output request**
- Add a **Note** with specific instructions e.g. which documents to send, where to post to, if any sections should be excluded etc



- Select **Adult Admin OT** from the Pass to team dropdown menu
- Click the **OK** button

The **Finish** icon  is to be used once the forms are complete, and no further input is required. If you have sent any requests you will not be able to 'finish' until these requests have been completed.

## Recording the Adult Moving and Handling Review

---

### Remember:

A **Moving and Handling Review** should only be scheduled for cases where it is necessary (See **Guidance for moving and handling reviews** for further practice guidance).

For cases where a review is scheduled and a new contact comes through the review will be cancelled by the Lead Practitioner (LP) when allocating the case.

The case will be treated as a new case i.e. an OT Specialist Assessment will be carried out rather than the review being picked up.

Unless the **Adult OT Casework Record** is already showing in **Current work** on the person's record; you must **start** the **Adult Moving and Handling Review** and assign yourself the **Adult OT Casework Record** as a 'send immediately' next action, then save and exit the step.


You should use the **Adult OT Casework Record** to record any relevant details e.g. telephone call to arrange the review. Please refer to the **OT Casework Record** user guide for further details.

To start the **Adult Moving and Handling Review**, 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 **Moving and Handling Review** will open in a separate window

Within the **Moving and Handling Review**, all appropriate sections of the form should be completed before the step is finished.

Remember to click the **Section completed** checkbox at the end of each section and use the **Save** icon  throughout your recording in the form. Please refer to [Tips for completing the form](#) for further details.

Next actions are mandatory in all forms so at least one next action must be added in **section 3** before the **Moving and Handling Review** can be finished.


To record a next action, click the **Add** button and follow the [instructions](#) above.


Remember to tick the **Send Immediately?** checkbox to send relevant next actions before finishing the **Moving and Handling Review**


Next Action	When to use	Who to assign to
Adult Moving and Handling Review	For cases where a Moving and Handling Review is necessary	The team's <b>Inbox (Moving and Handling)</b> using to Pass to worker > <b>Find</b> button  Type <b>%moving</b> in the 'Last Name' field to find the inbox
Adult OT Casework Record	To be used to record additional details e.g. arranging the review.  Only to be used if <b>not</b> already showing within Current work on the Person summary screen.	Self using the <b>Assign to Me</b> button
Adult OT Specialist Assessment	If it is decided a full and comprehensive assessment is required.	Self using the <b>Assign to Me</b> button  Or another worker using the Pass to worker > <b>Find</b> button

Next Action	When to use	Who to assign to
Adult Moving and Handling Complete (NFA)	For cases where no further Moving and Handling Review is necessary	This is a terminating (no further action) action, so does not need to be assigned.
Adult Moving and Handling Assessment and Plan	If the person's Moving and Handling Assessment and Plan needs to be updated.	Self using the <b>Assign to Me</b> button
Adult OT Non-Contract Specials	If the person requires a non-contract special item of equipment	Self using the <b>Assign to Me</b> button
Adult Internal Contact (assign to self)	If the person needs involvement from Adult Care SW/CCO.  This should <b>only</b> be used for cases <b>not already open</b> to Adult Care SW/CCO.	Self using the <b>Assign to Me</b> button
Adult Proposed Case Closure	When it is decided the case does not need to open/remain open and a full case closure is required.  Please refer to the <b>Case Closures - Full, Team and Involvement</b> user guide for full details	Self using the <b>Assign to Me</b> button
Adult Case Closure Already Started (NFA)	When a full case closure is required but it is already underway.  You must be able to see <b>Adult Proposed Case Closure</b> or <b>Adult Case Closure in Progress</b> within Current work on the Person summary screen	This is a terminating (no further action) action, so does not need to be assigned.

Before finishing the **Adult Moving and Handling Review** you should use the appropriate toolbar icons.


Remember following a review you should always send a copy of the latest **Moving and Handling Plan** along with the appropriate letters to the person (client) and the care provider - these letters along with other optional forms and letters are accessed via the **Forms and letters** icon .

Any external documents should be attached to the step using the **View documents** icon .

The requests and notifications available from the **Requests** icon  should be used and sent as required


<b>Request (R) /Notification (N)</b>	<b>When to use</b>	<b>Who to assign to</b>
<b>(N)</b> Adult Admin output request	To request Business Support generate a finished version of the latest M&H plan and post it out, along with relevant letters to the person/their representative and the care provider.  You must use the <b>Note</b> field to give specific details.	<b>Adult Admin OT</b> using the Pass to team dropdown menu
<b>(R)</b> Adult Please action	This appears in most workflow steps and can be used as and where required.	Another worker or team as appropriate by using the <b>Find</b> button
<b>(R)</b> Adult Please review information and authorise	Optional authorisation to be used as required.	Your manager / Level 2 OT using the Pass to worker > <b>Find</b> button


### To print the M&H letters:

- Click into the M&H letter tab
- Click the **Output current document** icon  – an 'Output Options' window will open
- Click **Output to PDF** – you can refer to the **Printing Documents** user guide if needed

**Please note:** You should repeat this process to print each covering letters as necessary. Click into each letter tab at the top of the screen and then repeat the process as above. You should also include a copy of the latest M&H plan – you will find this in the **Documents** section.

**To request Business Support send documents for you:**

- Click the **Requests** icon 
- Select **Adult Admin output request**
- Add a **Note** with specific instructions e.g. which documents to send, where to post to, if any sections should be excluded etc
- Select **Adult Admin OT** from the Pass to team dropdown menu
- Click the **OK** button

The **Finish** icon  is to be used once the forms are complete, and no further input is required. If you have sent any requests you will not be able to 'finish' until these requests have been completed.