

Adults Quick Guide

Non-Contract Specials Process

For cases where a person's needs are complex they may need a bespoke solution, such as a piece of equipment which is not available as a standard stock item. This equipment is classed as a **non-contract special (NCS)**.

This guide only covers the Mosaic process.

Please refer to documents held in the **iris4 NRS document library** that guide you through the process for prescribing of **Non-Contract Specials (NCS)**

Once the decision has been made to progress with the prescription of a non-contract special, the **Adult OT Non-Contract Specials** workflow step should be completed by you (the prescribing OT).

This workflow step is a next action from various OT workflow steps. It can be added as a '**send immediately**' action to allow you to complete it while other work is ongoing.

For any like for like repair / replace requests that come through to duty the **Adult OT Non-Contract Specials** is also a '**send immediately**' next action from the **OT Conversation Record**.

Clear clinical reasoning must be recorded within relevant workflow steps whenever a non-contract special is required or your request will be returned by the authorising Lead Practitioner (LP).

Basic Non-Contract Specials Process in Mosaic

The process begins in the same way but will vary depending on whether the LP needs to escalate the case to the Principal OT / delegated Locality Lead (LL) or not, and also whether they then need to escalate the case further to the Panel Chair or not.

The process will always begin and end with the prescribing OT – they start and finish the step

1. OT completes sections 1 to 3 of Adult OT Non-Contract Specials step and sends mandatory request to LP then exits the step

If additional information required

1. LP returns request
2. OT updates the step and then resends the request

If LP agrees with provision of equipment, or denies it, and no escalation is required

1. LP completes the request, records necessary details in the Authorisation subsection within section 2 and then exits the step
2. OT resumes step, records relevant next action and then finishes the step

If LP needs to escalate to Principal OT / delegated Locality Lead (LL)

1. LP completes the request, sends new request to Principal OT / LL, records necessary details in the Authorisation subsection within section 2 and then exits the step

If Principal OT / LL agrees with provision of equipment, or denies it, and no further escalation is required

1. Principal OT / LL completes the request, records necessary details in the Authorisation subsection within section 2 and then exits the step
2. OT resumes step, records relevant next action and then finishes the step

If Principal OT / LL needs to escalate to Panel Chair

1. Principal OT / LL completes the request, sends new request to Panel Chair, records necessary details in the Authorisation subsection within section 2 and then exits the step

Panel Chair agrees with provision of equipment, or denies it

1. Panel Chair completes the request, records necessary details in the Authorisation subsection within section 2 and then exits the step
2. OT resumes step, records relevant next action and then finishes the step

OT - Recording the Adult OT Non-Contract Specials

To start the **Adult OT Non-Contract Specials**, 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 **Adult OT Non-Contract Specials** will open in a separate window

Tips for completing the form

Clicking on the **Show guidance** icon  will give you additional practice assistance relevant to the associated question.

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.

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

Blue cog  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 **Section 2. Request Details** use the **date picker** icon  to record the **Date of application** and use the **Find** button to record your details as the **prescriber**.

Record all relevant details in the **Request Details** subsection.

The **Authorisation** subsection should be completed by your Lead Practitioner (LP) so you must send them the mandatory request using the **Requests** icon .

For all cases, the prescribing OT will add the relevant next action and finish the step once the process is complete, i.e. equipment ordered or no further action is needed as the request has been rejected.

To send the request:

- Click the **Requests** icon 
- Select **Required Adult Please review non-contract specials request and authorise**
- Add a **Note** if needed
- Use the **Pass to Worker > Find** button to search for your LP
- Click the **OK** button
- Exit the step using the **Close** icon  - say 'yes' to save any changes

OT - Incomplete work – while awaiting a decision

The **Adult OT Non-Contract Specials** step will remain in your **Incomplete work** folder until it is agreed the non-contract special item(s) is required and this has been ordered, or the application is rejected as it is decided the non-contract special item(s) is not required.

Sent – awaiting a response

When you send the **Required Adult Please review non-contract specials request and authorise** request to your LP, the **Adult OT Non-Contract Specials** step remains in your **Incomplete work** folder.

It will be highlighted in **yellow** and the **work** icon  will have a blue arrow pointing to the right to indicate a request has been sent (to your LP).

Returned

If the LP feels more information is required they will return the request the **Adult OT Non-Contract Specials** step remains in your **Incomplete work** folder, but will now be highlighted in

red with the **work** icon  now having a red arrow pointing to the left to indicate a request has been returned.

Escalated to Principal OT / delegated Locality Lead (LL) / Panel Chair

If the LP agrees with the request but needs to escalate the case to the Principal OT / delegated Locality Lead (LL) the **Adult OT Non-Contract Specials** step remains in your **Incomplete work** folder.

It will still be highlighted in **yellow** and the **work** icon  will have a blue arrow pointing to the right to indicate a request has been sent (to the Principal OT / delegated LL).

If the Principal OT / delegated LL agrees with the request but needs to escalate the case to the Panel Chair the **Adult OT Non-Contract Specials** step remains in your **Incomplete work** folder.

It will still be highlighted in **yellow** and the **work** icon  will have a blue arrow pointing to the right to indicate a request has been sent (to the Panel Chair).

Request Completed (agreed or denied)

Once the final decision has been made to either allow for the non-contract special to be ordered, or that the non-contract special is not required, the **Adult OT Non-Contract Specials** step remains in your **Incomplete work** folder.

It will no longer be highlighted in yellow or red – it will just have a **white** background with the **work** icon  having a green tick to indicate that all requests have been completed.

It is at this stage you (the prescribing OT) should 'resume' the step, add the relevant next action and 'finish' the step.

Remember, for all cases, the prescribing OT will add the relevant next action and finish the step once the process is complete, i.e. equipment ordered or no further action is needed as the request has been rejected.

Once the **work** icon  with a green tick is visible in their **Incomplete work** folder

OT - Resuming and Finishing the Adult OT Non-Contract Specials

To resume the **Adult OT Non-Contract Specials**, from within the person's record:

- Click the **Incomplete work** icon  within **Current work** on the **Person summary** screen
- Click **Resume work** from the menu

The **Adult OT Non-Contract Specials** will open in a separate window

Section 4. Next actions

A next action must be added before the **Adult OT Non-Contract Specials** step can be finished.

The next action will only need be added once you know whether the non-contract special has been agreed or not.

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
- Click the **Add and close** button

Next Action	When to use	Who to assign to
Adult OT Non-Contract Specials	When another non-contract specials form is required i.e. where the initial request is unsuccessful	Self using the Assign to Me button
Adult No Further Action Required	When the form is complete and another non-contract specials form is not required	This is a terminating (no further action) action, so does not need to be assigned.

LP - Completing the Request – agreed or rejected (with no escalation needed)

Required Adult Please review non-contract specials request and authorise will appear in the LP's **Incoming requests** folder.

The LP should click the request **title hyperlink** to access the workflow step summary screen and then click **Resume** in the sidebar menu to open the step.

If the LP agrees with the prescription of the non-contract specials item, or rejects the application and does not feel the case needs to be escalated to the Principal OT / delegated LL, they will complete the **Authorisation** subsection within **Section 2. Request Details**.

They will also complete the request.

To complete the request:

- Click the **Requests** icon 
- Click the red text **Required Adult Please review non-contract specials request and authorise**
- Click the **Completed** radio button
- Add a brief **Note** to advise if the request has been authorised without the need to escalate the case, or rejected and why it has been rejected. Full details should be recorded in the **Authorisation** subsection
- Click the **OK** button
- Exit the step using the **Close** icon  - say 'yes' to save any changes

The **Adult OT Non-Contract Specials** step will remain in the prescribing OT's **Incomplete work** folder with a **white** background and the **work** icon  will have a green tick to indicate the request has been completed.

It is at this stage the prescribing OT should 'resume' the step, add the relevant next action and 'finish' the step.

LP – Returning the Request – missing information

If the LP believes more information is required before a decision can be made they will return the request to the prescribing OT

To return the request:

- Click the **Requests** icon 
- Click the red text **Required Adult Please review non-contract specials request and authorise**
- Click the **Returned** radio button
- Add a **Note** explaining why you are returning it
- Click the **OK** button
- Exit the step using the **Close** icon  - say 'yes' to save any changes

The **Adult OT Non-Contract Specials** step will remain in the prescribing OT's **Incomplete work** folder highlighted in **red** and the **work** icon  will have a red arrow pointing to the left to indicate a request has been returned.

The prescribing OT should add more information to the form as requested and then resend the **Required Adult Please review non-contract specials request and authorise** request

OT - Resending a Returned Request

To resend the request:

- Click the **Requests** icon 
- Click the red text **Required Adult Please review non-contract specials request and authorise**
- Click the **Send Again** button
- Add/Update **Note** if needed

- If needed - Use the **Pass to Worker > Find** button to search for a different LP
- Click the **OK** button
- Exit the step using the **Close** icon  - say 'yes' to save any changes

The **Adult OT Non-Contract Specials** step remains in the prescribing OT's **Incomplete work** folder.

It will still be highlighted in **yellow** and the **work** icon  will have a blue arrow pointing to the right to indicate a request has been sent back (to the LP).

The LP can then authorise the request or escalate the case as necessary.

LP - Escalating to Principal OT / Delegated LL

If the LP needs to escalate the case to the Principal OT / delegated LL they will complete the **Authorisation** subsection within **Section 2. Request Details**.

They will also complete the request and then assign a new **Required Adult Please review non-contract specials request and authorise** request to the Principal OT / delegated LL

To complete the request and then send a new one:

- Click the **Requests** icon 
- Click the red text **Required Adult Please review non-contract specials request and authorise**
- Click the **Completed** radio button
- Add a brief '**Note**' to explain you agree with the request but are escalating the case. Full details should be recorded in the **Authorisation** subsection
- Click the **OK** button
- Click the **Save** icon 

- Click the **Requests** icon 
- Click **Send request**
- Select **Required Adult Please review non-contract specials request and authorise**
- Add a brief '**Note**' to explain why the case is being escalated. Full details should be recorded in the **Authorisation** subsection
- Use the **Pass to Worker > Find** button to search for the Principal OT / delegated LL
- Click the **OK** button
- Exit the step using the **Close** icon  - say 'yes' to save any changes

The **Adult OT Non-Contract Specials** step remains in the prescribing OT's **Incomplete work** folder.

It will still be highlighted in **yellow** and the **work** icon  will have a blue arrow pointing to the right to indicate a request has been sent (to the Principal OT / delegated LL).

Principal OT / Delegated LL – Completing the Request

Required Adult Please review non-contract specials request and authorise will appear in the Principal OT / delegated LL's **Incoming requests** folder.

The Principal OT / delegated LL should click the request **title hyperlink** to access the workflow step summary screen and then click **Resume** in the sidebar menu to open the step.

If the Principal OT / delegated LL agree with the prescription of the non-contract specials item, or reject the application, they will complete the **Principal OT Details** subsection within **Section 2. Request Details**.

They will also complete the request

To complete the request:

- Click the **Requests** icon 

- Click the red text **Required Adult Please review non-contract specials request and authorise**
- Click the **Completed** radio button
- Add a brief '**Note**' to advise if the request has been authorised without the need to escalate the case to panel, or rejected and why it has been rejected. Full details should be recorded in the **Principal OT Details** subsection
- Click the **OK** button
- Exit the step using the **Close** icon  - say 'yes' to save any changes

The **Adult OT Non-Contract Specials** step will remain in the prescribing OT's **Incomplete work** folder with a **white** background and the **work** icon  will have a green tick to indicate the request has been completed.

It is at this stage the prescribing OT should 'resume' the step, add the relevant next action and 'finish' the step.

Principal OT / Delegated LL - Escalating to Panel

If the Principal OT / delegated LL feel the case needs referring to panel they will complete the **Principal OT Details** subsection within **Section 2. Request Details**.

They will also complete the request and then assign a new **Required Adult Please review non-contract specials request and authorise** request to the Panel Chair

To complete the request and then send a new one:

- Click the **Requests** icon 
- Click the red text **Required Adult Please review non-contract specials request and authorise**
- Click the **Completed** radio button

- Add a brief '**Note**' to explain you agree with the request but are escalating the case. Full details should be recorded in the **Principal OT Details** subsection
- Click the **OK** button
- Click the **Save** icon 
- Click the **Requests** icon 
- Click **Send request**
- Select **Required Adult Please review non-contract specials request and authorise**
- Add a brief '**Note**' to explain why the case is being escalated. Full details should be recorded in the **Principal OT Details** subsection
- Use the **Pass to Worker > Find** button to search for the Panel Chair
- Click the **OK** button
- Exit the step using the **Close** icon  - say 'yes' to save any changes

The **Adult OT Non-Contract Specials** step remains in the prescribing OT's **Incomplete work** folder.

It will still be highlighted in **yellow** and the **work** icon  will have a blue arrow pointing the right to indicate a request has been sent (to the Panel Chair).

Panel – Completing the Request

Required Adult Please review non-contract specials request and authorise will appear in the Panel Chair's **Incoming requests** folder.

The Panel Chair should click the request **title hyperlink** to access the workflow step summary screen and then click **Resume** in the sidebar menu to open the step.

If the Panel agrees with the prescription of the non-contract specials item, or rejects the application, the Panel Chair will have to complete the **Non-Contract Specials Panel** subsection within **Section 2. Request Details**.

They will also complete the request

To complete (authorise) the request:

- Click the **Requests** icon 
- Click the red text **Required Adult Please review non-contract specials request and authorise**
- Click the **Completed** radio button
- Add a brief '**Note**' to advise if the request has been authorised, or rejected and why it has been rejected. Full details should be recorded in the **Non-Contract Specials Panel** subsection
- Click the **OK** button
- Exit the step using the **Close** icon  - say 'yes' to save any changes

The **Adult OT Non-Contract Specials** step will remain in the prescribing OT's **Incomplete Work** folder with a **white** background and the **work** icon  will have a green tick to indicate the request has been completed.

It is at this stage the prescribing OT should 'resume' the step, add the relevant next action and 'finish' the step.