

## Adults Quick Guide

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### Adult Adaptation Process

The **Adult Adaptation** workflow step is used to request **non DFG adaptations** for all Council properties, LCC funded adaptations or when a housing association is funding an adaptation.

The next action of **Adult Adaptation – Other** is an alias for this workflow step and should be assigned to self as a '**sent immediately**' next action from relevant OT workflow steps. This means it can be added, and completed before the workflow step it is selected from has been finished.

For DFGs for private properties (privately owned and private tenancies) the adaptation request must be sent to the District/City/Borough Council via Mosaic using the **Adult Disabled Facilities Grant Request** step.

**Adult Adaptation** must not be used for DFGs.

Please refer to the **Adult DFG Process for OTs** user guide for further details.

### Completing the Adaptation step

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To start the **Adult Adaptation**, 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 Adaptation** will open in a separate window


The **Adult Adaptation** workflow step contains a form called **Adult Recommendation for Adaptation to Property**


The step should be completed with as much information as possible.

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

Click the **Forms and letters** icon  to select and complete any relevant scheme forms required to support the adaptation request.

Use the **View documents** icon  to upload and attach any relevant external documentation e.g. building plans relating to the adaptation.

Use the category: **AC Equipment and Adaptations** and sub category: **Adaptation** for any documents you are attaching.

Refer to the **Uploading Documents** user guide for further guidance

**Sections 1 and 2** should be completed before the form is output as a PDF and sent to the District/City/Borough Council or Home Improvement Agency (HIA) via email.

## Section 1. Recipient Details


Select the relevant District/City/Borough Council or HIA as the recipient based on where the person lives/type of property etc.



Use the **Find** button to add your details as the 'sender'.



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

## Section 2. Recommendation for Adaptation

The fields contained in this section of this form should be completed with as much information as possible.

**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 (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

**Yellow cogged**  fields prepopulate but can be manually updated within the form if needed. For best practice, where appropriate, these should be treated as per the advice for **Blue cogged**  fields to ensure the record is accurate and up to date.

Use the **Find** button to record details of each **Guardian/Next of Kin/Carer** and also to record the **'Names of everyone who lives in the property with the applicant'**

Use the **Insert Section** button to duplicate the fields if the person has multiple **Guardian/Next of Kin/Carer** details to be recorded


As per the red warning message in the form at least one mandatory outcome must be selected. You can also select as many optional outcomes as relevant.


Any outcomes selected and will pull through into the **Adult Adaptation Monitoring** form (next step in the process for council adaptations). This information can be updated in the **Adult Adaptation Monitoring** form if required.

Use the question **'Plans/specification to be forwarded to Occupational Therapist for approval?'** to indicate if you'd like the Council to send you the request to sign off all plans and specifications.

### **To generate the PDF Output (Non LCC funded adaptations):**

Where appropriate, a PDF of sections 1 and 2 of the **Recommendation for Adaptation to Property** form along with any scheme forms and attached documents should be emailed to the relevant District/City/Borough Council or Housing Association.



The **Output current document** icon  should be used to generate the PDF(s). For further guidance please refer to the **Printing Documents** user guide.

You would then need to exit the step using the **Close** icon  and await a response from the Council or Home Improvement Agency


## **LCC Funded Adaptations only:**

For LCC funded adaptations once you have completed sections 1 and 2 you must send an authorisation request to your Lead Practitioner (LP).

### **To send the request:**

- Click the **Requests** icon 
- Select **Adult Please review information and authorise**
- Note = Record any relevant information
- Search for your LP using the Pass to worker > **Find** button
- Click the **OK** button to close the popup window
- Click the **Save** icon  to send the request

Refer to the **Requests and Notifications** user guide for further guidance around sending requests and notifications.

You would then need to exit the step using the **Close** icon  and wait for the LP to complete or return the request.

If the LP agrees with the adaptation they will send the **Purchase Adaptation grant on Business World On** request to **Adult Admin OT** (Business Support).

Business Support will record the adaptation (purchase) on Business World On and then complete the request in Mosaic.

Once both requests are complete you can continue inputting to and finish the **Adult Adaptation** step.

## For all Adaptations - Resume and Finish the step

Sections 3 and 4 of the **Recommendation for Adaptation to Property** form should be completed once the District/City/Borough Council or HIA confirms the adaptation is likely to progress.

Or for LCC funded adaptations, once the requests have been completed.

To resume the **Adult Adaptation**, 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

### Section 3. Recommendation for Adaptation Received

Use the **Find** button to record the relevant information in **Applicant Details** and **Returned by** subsections as appropriate

### Section 4. Next actions

Next actions are mandatory in all forms. At least one next action must be added before the **Adult Adaptation** 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 = Find/Select as appropriate - Not required for NFA actions
- Reason = Select as appropriate (only available for certain actions)
- Note = Record any necessary information – recommended when assigning a next action to another 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 **Adult Adaptation**

Action	When to use	Who to assign to
Adult Adaptation Monitoring	<p><b>Council adaptations only</b></p> <p>When the adaptation has been requested, to allow it to be monitored until the adaptation work has been completed or cancelled.</p> <p>A 'Scheduled Date' will default for 3 months, but this date can be changed if needed.</p> <p>Add a '<b>Note</b>' stating your name and why the case is ongoing / why it is being reassigned e.g. <i>Harry Potter (OT). Awaiting LAS to council property</i></p>	<p>OT team's <b>DFG inbox</b> using the Pass to worker dropdown menu</p> <p>Or Self using the <b>Assign to Me</b> button</p>
Adult Internal Contact (assign to self)	<p>If the person needs involvement from Adult Care SW/CCO.</p> <p>This should <b>only</b> be used for cases <b>not already open</b> to Adult Care SW/CCO.</p>	<p>Self using the <b>Assign to Me</b> button</p>
Adult OT Casework Record	<p>Only to be used if <b>not</b> already showing within <b>Current work</b> on <b>Person summary</b>.</p>	<p>Self using the <b>Assign to Me</b> button</p>
Adult Adaptation Completed (NFA)	<p>To indicate the adaptation work has been completed – for cases where no monitoring is required.</p>	<p>This is a terminating (no further action) action, so does not need to be assigned</p>

Action	When to use	Who to assign to
Adult Adaptation Process Abandoned / Cancelled (NFA)	To indicate the adaptation work has been cancelled and will not be completed	This is a terminating (no further action) action, so does not need to be assigned
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 Proposed Case Closure	If a full case closure is required, i.e. no further OT involvement is required and the case is not open to any other teams  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)	If a full case closure is required and is already underway  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

Before finishing your **Adult Adaptation** step you should always consider whether you need to use any of the other toolbar icons at the top of the screen.

Clicking the **Finish** icon  will finish and complete your **Adult Adaptation**. Once clicked, it will lock down your **Adult Adaptation** step and no further input can be made.

You will find your finished **Adult Adaptation** in the **Documents** section in the sidebar menu. It will display as the form name – **Adult Recommendation for Adaptation to Property**.

## Council property adaptations only - While waiting for adaptation

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Unless the case is still active or particularly complex which means you need to remain actively involved, for council property adaptation cases where you are waiting for the adaptation to be completed the **Adult Adaptation Monitoring** (if not already assigned to the inbox), **Adult OT Casework Records** and **Adult OT Goals and Action Plans** should be moved to team's DFG inbox.

You should also end your worker relationship – again unless the case is still active or particularly complex which means you need to remain actively involved.

### To reassign the steps to the Team's Inbox (DFG):

- In **Full workview** click on the **Bulk Assign** button on the **Current work** header bar



The **Bulk action** window will display.

- All the Current work is listed - filter the list by typing the person's name into the search field.
- Tick the checkbox next to the **Adaptation Monitoring** (if not already assigned to the inbox), **OT Casework Record** and **OT Goals and Action Plan**
- In the Team worker dropdown menu select the Team's **Inbox (DFG)**
- Click the **Preview assign** button
- Add a **'Note'** stating your name and why the case is ongoing / why it is being reassigned e.g. *Harry Potter (OT). Awaiting LAS to council property* – this note will appear against both/all three workflow steps
- Click the **Assign** button (and then **Cancel** button to close the **Bulk action** window) – the steps will then move from your Incomplete work folder to the inbox's Incomplete work folder

### To End your Worker relationship

- Click **Person details > Worker relationships** in the sidebar menu or click the **Change** hyperlink next to **Professionals** within the **Professional and organisational relationships** section



- Click **Edit Pencil** icon  against your relationship
- Record a 'To Date' using the **date picker** icon 
- Select the most appropriate 'End Reason' from the dropdown menu
- Click the **Save** button
- Click the **OK** button to return to the **Person summary** screen

Please see the **Worker Relationships** user guide for further details.

## Council property adaptations only - Completing the Adaptation Monitoring

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The **Adult Adaptation Monitoring** step should only be used for council adaptations, it is not to be used for LCC funded adaptations.

The **Adult Adaptation Monitoring** step is to remain open from when the adaptation has been requested until the adaptation is completed, or until you are informed that the adaptation work is no longer going ahead.

This step should be used to log all communications from the District/City/Borough Councils or Home Improvement Agency (HIA), the person and their family/representatives. It replaces the need to record this information in case notes or the **Adult OT Casework Record** for these cases.


For LCC funded adaptations all monitoring should be captured within the **Adult OT Casework Record**



To start/resume the **Adult Adaptation Monitoring**, from within the person's record:

- Click the **Incoming work** icon  / **Incomplete work** icon  within **Current work** on the **Person summary** screen
- Click **Start work** / **Resume work** from the menu
- If starting the step when it is assigned to the team's DFG inbox you will see a popup window – click **Yes** to continue

The **Adult Adaptation Monitoring** will open in a separate window

## Section 1. Personal Details

**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 (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

## Section 2. Monitoring

This section is where all activity is logged.

Click **Add** to record each monitoring activity


The 'Recorded by worker' field is important to show who has recorded each line of activity.


Click **Add** to record more activity or '**Add and close**' when only recording one activity.

If activity is recorded the following icons are displayed:


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

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

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

Once you have added activity if the work is not yet complete you should exit the step using the **Close** icon  - say 'yes' to save any changes.

If you started the monitoring step you may need to re-assign it back to the DFG inbox by;

- clicking the **Incomplete work** icon  within **Current work** on the **Person summary** screen
- clicking **Update assignment** from the menu
- selecting the team's **DFG inbox** from the **Team Worker** dropdown menu
- Add a **'Note'** stating your name and why the case is ongoing / why it is being reassigned e.g. *Harry Potter (OT). Awaiting LAS to council property*
- Click the **OK** button

### Section 3. Overall Outcomes Achieved

The mandatory and optional outcomes and additional information note box completed in the **Adult Adaptation** step will prepopulate.

Further mandatory and optional outcomes can be selected and the 'additional information' note box can be edited if required.

### Section 4. Completion Details

This section will pull through with details of the person who started the monitoring step. This can be updated to the name of the person completing the step if required.

### Section 5. Next actions


Next actions should only be recorded once the adaptation work is complete or when you are informed the work will not be completed.

A next action must be added before the **Adult Adaptation Monitoring** can be finished.

To record a next action:

- Click the **Add** button
- Select the relevant action from the **Select action** dropdown menu
- Assign to = Find/Select as appropriate - Not required for NFA actions
- Click the **Add and close** button

Action	When to use	Who to assign to
Adult Adaptation Completed (NFA)	To indicate the adaptation work has been completed.	This is a terminating (no further action) action, so does not need to be assigned
Adult Adaptation Process Abandoned / Cancelled (NFA)	To indicate the adaptation work has been cancelled and will not be completed	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, i.e. no further involvement from OT is required and the case is not open to any other teams  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)	If a full case closure is required and is already underway  You must be able to see <b>Adult Proposed Case Closure</b> or <b>Adult Case Closure</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


Clicking the **Finish** icon  will finish and complete your **Adult Adaptation Monitoring** form - once clicked, it will lock down the step and no further input can be made – this should only be clicked once the adaptation work is complete or you have been told the work will not be carried out.

## **Council property adaptations only - Completed / Cancelled Adaptations**

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Once it is confirmed the adaption work is completed or cancelled, as well as finishing the **Adult Adaptation Monitoring** step as described above, you must also reassign the **Adult OT Casework Record** and **Adult OT Goals and Action Plan** back to yourself for completion.

### **To reassign the steps from the Team's Inbox (DFG):**

- Change to **Full workview** and access the **Team workview** by clicking the **Show team workview** icon 
- Within the **Team summary** click the hyperlink for the **Inbox (DFG)**
- Click on the **Bulk Assign** button on the **Current work** header

The **Bulk action** window will display.

- All the Current work is listed - filter the list by typing the person's name into the search field.
- Tick the checkbox next to the **OT Casework Record** and **OT Goals and Action Plan**
- In the Team worker dropdown menu select **your name**
- Click the **Preview assign** button
- Click the **Assign** button (and then **Cancel** button to close the **Bulk action** window) – the steps will then move back to your Incomplete work folder

If needed, refer to the **OT Casework Record** and **OT Goals and Actions Plan** user guides for further details on completing these steps.