

## Quick Guide

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### Disabled Facilities Grant (DFG) Process for Councils





This user guide is intended to support the District/City/Borough Councils to screen and record Disabled Facilities Grant (DFG) cases in Mosaic.

You will receive all cases referred by OTs to screen and accept as appropriate.

These cases will arrive as an **Incoming request** for the team.

### To Complete or Return an Incoming Request

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- Access **Full workview** (accessed by clicking the **Show full workview** icon  which is 'greyed out' when you are in **Full workview** )
- Access the **Team workview** - click the **Show team workview** icon  (the **Show team workview** icon changes to the **Show individual workview** icon  when you have accessed the Team workview, and if clicked will return to your Individual workview)
- Open the **Current work** section
- Open the **Incoming requests** folder

Any 'Note' recorded by the OT when the request was sent will be visible when in **Full workview**


- Click the request title, '**Please review information and complete request: Adult/CS Disabled Facilities Grant Request**'


The workflow step summary screen for the **Disabled Facilities Grant Request** will display


Any 'Note' recorded by the OT when the request was sent will be visible in the **Requests** section

- Click **Resume** in the sidebar menu

The **Disabled Facilities Grant Request** step will open in a separate window.

- Review the **Disabled Facilities Grant Request** step – clicking into each section using the sections menu
- Click into **Section 4. Next actions** and check the next action **DFG Application for Adaptation** has been recorded and assigned to the correct team.
- Review any attachments (e.g. plans) via the **View documents** toolbar icon 
- Review any extra forms (e.g. schemes) which will be open as additional tabs on the screen.

The **Requests** toolbar icon  will be highlighted in red denoting that there is a request to complete.

- Click on the **Requests** icon 
- Click on the **red text box** to open the outstanding request

You will complete the request if you are accepting the case and will return the request if there is insufficient information.

## Completing the Request – Accepting the Case

- Select the **Completed** radio button
- Click the **OK** button

The **Disabled Facilities Grant Request** step screen displays

- Click the **Finish** toolbar icon 

The **DFG Application for Adaptation** step will be sent and appear in your team's Incoming work folder.


For further guidance regarding how to complete a request refer to the **Completing or Returning Requests** user guide.

## Returning the Request – Rejecting the Case

Only to be carried out if there is insufficient/missing information

- Select the **Returned** radio button
- Add a note to explain what information is missing
- Click the **OK** button

The **Disabled Facilities Grant Request** step screen displays

The step should then be exited rather than finished using the **Close** toolbar icon .

This will send the case back to the referring OT. You can then ignore the case until a new **Incoming request** is received.

For further guidance regarding how to return a request refer to the **Completing or Returning Requests** user guide.

## Incorrect Requests e.g. for Council Owned Properties

If you receive an incorrect DFG request e.g. for a Council owned property you still need to 'complete' the request as described above but you will need to add a note to explain why the case is not being accepted.

Rather than finishing the step, you will then need to exit using the **Close** toolbar icon .

The referring OT will be responsible for amending the next action and finishing the step.

## Record the Team Involvement (Organisational Relationship)

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This is only necessary for **accepted** cases.

From the **Person summary** screen,

- Click **Person details > Organisational relationships** in the sidebar menu
- Click the **Add** button

- Click the **Find** button
- Search for your team by typing **DFG** in the name field
- Click on the correct DFG **team name hyperlink** to select it
- Relationship Type = select **Involved Team**
- Amend From date if required – usually required if team is being added retrospectively
- Click the **Save** button
- Click the **OK** button to return to the **Person summary** screen

The team will display within **Professional and organisational relationships**

Refer to the **Organisational Relationships** user guide for further details

## Viewing Documents

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You can view the completed **Disabled Facilities Grant Request** along with other relevant documents such as **schemes** and **plans** within the **Documents** section in a person's record.

- From the **Person Summary** screen, click **Documents** in the sidebar menu

The **Forms and letters** tab will contain any forms completed in Mosaic e.g. the Disabled Facilities Grant Request and any schemes.

These can be opened by clicking on the form name hyperlink.

The **Attachments** tab will contain any external documents that have been 'uploaded' to the record e.g. plans.

These can be opened by clicking the form name hyperlink and then clicking Download a copy





Refer to the **Documents Section** user guide for more information.

## Start Incoming Work (DFG Application for Adaptation)


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Once a case has been accepted it will appear as **Incoming work** for the team.


We recommend you access the person's record before starting the work – this will allow you to review the record and make yourself aware of important information e.g. any warnings visible on the **Person summary** screen.

- Access **Full workview** (accessed by clicking the **Show full workview** icon  which is 'greyed out' when you are in **Full workview** )
- Access the **Team workview** - click the **Show team workview** icon  (the **Show team workview** icon changes to the **Show individual workview** icon  when you have accessed the Team workview, and if clicked will return to your Individual workview)
- Open the **Current work** section
- Open the **Incoming work** folder
- Click the **person's name** within the **Subject** column to access their record.

To start the **DFG Application for Adaptation** step, from within the person's record:

- Click the **Incoming work** icon  within **Current work**
- Click **Start work** from the menu
- Click the **'Yes'** button on the popup window (you will see this as the step is still assigned to the team)



The **DFG Application for Adaptation** will open in a separate window

**Please note:** The **DFG Application for Adaptation** step will be assigned to you once you start the form and click the **Save** toolbar icon  – this will then be in your **Incomplete work** folder until finished.


## Completing the DFG Application for Adaptation

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This form should be completed throughout the DFG process and so will be accessed and updated repeatedly until the adaptation is complete or is cancelled.

Remember to use the **Save** toolbar icon  throughout your inputting and use the **Close** toolbar icon  to exit the step when needed. Say 'yes' to save any changes when exiting.

**Sections 1 – 3** pull through information from the Disabled Facilities Grant Request – you should review this information and use it as necessary.


- Use the **date picker** icon  to record the mandatory **Date recommendation received from OT** in **section 2**
- Note further information can be recorded or updated in **section 2** where required.

Complete **section 4** with relevant information as and when known:

- Use the **date picker** icon  to record dates
- Select relevant options from the dropdown menus
- Record text fields as appropriate
- Use the **Insert Section** button to duplicate the fields if multiple revised plans need to be recorded.
- Use the **Add** button to record details of the **Type of Work Completed**
  - Click the **Add** button to repeat the process if multiple types of work is completed.
  - Click the **Add and Close** button if only recording one type of work, or once all work has been logged.
- Click on the **Show guidance** icon  and refer to the guidance displayed throughout input to this section
- Use the **View documents** toolbar icon  to attach any external documents (e.g. plans).

- Use the category **AC/CS Adaptations** and sub category **DFG Application** for any documents you are attaching

Refer to the **Uploading Documents** user guide for more information.


- Use the requests and notifications (available in the **Requests** toolbar icon ) to communicate with the OT throughout the process



**Requests** require a response before the **DFG Application for Adaptation** workflow step can be finished e.g. to sign off plans/specifications etc or provide additional information

**Notifications** are sent purely for information e.g. to update the OT on progress or notify them on the outcome at the end of the process.

<b>Request (R) / Notification (N)</b>	<b>When to use and why</b>
(R) DFG additional information required	At any stage - to request further information from the OT
(R) Please review and authorise plans	At any stage - to request plan are signed off by the OT
(N) Notify OT – DFG Progress Update	At any stage - to notify the OT of important information e.g. date grant approved
(N) Required Advise OT of DFG outcome	At the end of the process - to notify the OT whether the DFG was completed or cancelled

#### **To send a request or notification:**

- Click the **Requests** toolbar icon 
- Select the relevant request / notification
- Find / select the relevant worker (OT) or Adult OT Duty team (if OT has left LCC)
- Add a note to explain why you are sending the request / notification
- Click the **OK** button



- Click the **Save** toolbar icon 
- If sending a request exit the step using the **Close** toolbar icon  so the OT can access the step to complete it. Say 'yes' to save any changes when exiting.

For further guidance regarding how to send requests and notifications refer to the **Requests and Notifications** user guide.

If you have sent a request the **DFG Application for Adaptation** will remain in your **Incomplete work** folder, highlighted in yellow to indicate a request has been sent.

- If the OT completes the request the yellow highlight will vanish
- If the OT returns the request the **DFG Application for Adaptation** will change to be highlighted in red – the note recorded to state why the OT has returned the request will be visible in the 'Notes' column (when in **Full workview**)


If you have already completed the request from the **Disabled Facilities Grant Request** step before identifying that the application is for a Council owned property, you will need to:

- send the **Required Advise OT of DFG outcome** notification to the referring OT using the **Requests** toolbar icon  - adding a note to explain why the case is not being progressed e.g. Council Property
- select a next action of **DFG Not Progressed (NFA)**
- finish the **DFG Application for Adaptation** step by clicking the **Finish** toolbar icon 

## Resume and Finish Incomplete Work (DFG Application for Adaptation)



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To enter (resume) the step once it has already been started, from within the person's record:

- Click the **Incomplete work** icon  against the **DFG Application for Adaptation** within **Current work**
- Click **Resume work** from the menu



Remember you will be exiting and resuming this step until the adaptation is complete or is cancelled.

Use the **Save** toolbar icon  throughout your inputting and use the **Close** toolbar icon  to exit the step when needed. Say 'yes' to save any changes when exiting.

## Next actions

When the outcome of the adaptation is known e.g. DFG completed or cancelled, the relevant next action will need to be recorded.


Next Action	When to use and who to assign to
DFG Adaptation Complete (assign to OT)	If the adaptation is completed.  Assign to the referring OT, or the relevant OT team for cases where the OT has left LCC.
DFG Not progressed (NFA)	If the adaptation is cancelled.  This is a terminating action so does not need to be assigned to a worker or team.

## Requests icon

As described above, you must send the **Required Advise OT of DFG outcome** notification to the referring OT, or to the referring OT's team for cases where the OT has left LCC.

Remember to refer to the **Requests and Notifications** user guide for further details if needed.

## Finish the step



Once all information has been recorded, the relevant next action added, and the mandatory notification sent, click the **Finish** toolbar icon .

## End the Team Involvement (Organisational Relationship)

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Once the **DFG Application for Adaptation** step has been finished you must also end the team's involvement.

From the **Person Summary** screen:

- Click **Person details > Organisational relationships** in the sidebar menu
- Click the **Edit Pencil** icon  against the DFG team's involvement
- To = Record end date using the **date picker** icon 
- End Reason = Select appropriate value from dropdown menu (e.g. Case Work Completed)
- Click the **Save** button
- Click the **OK** button to return to the **Person summary** screen.

The team will display in **Professional and organisational relationships** until midnight of the end ('To') date.

Refer to the **Organisational Relationships** user guide for further details