

# Occupational Therapy – Processing Requests and Awaiting Allocation

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## **Please note**

This document is intended to support staff who have attended the Mosaic training course relevant to their role. If you have not attended a relevant course, please contact the [Mosaic Children's Training Team](#). Every effort has been made to ensure that screen shots included are current; there may be some minor differences in look and feel within the system. All data-examples included in this document are fictitious. Any resemblance to real persons, living or dead, is purely coincidental.

## Introduction

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This guidance outlines the initial process for the **Occupational Therapy** team. The workflow can be initiated via a Childrens Service Contact or an Internal Contact which is added by the Social Worker. The guide will detail the initial contact, how the request for the service is reviewed and the allocation waiting list.

**Please note:** At each step, the worker can attach any relevant paperwork to the step by selecting the  view documents icon.

## Childrens Services Contact – completed by CSC Workers/ OT Business Support

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The Childrens Service Contact workstep can be completed by the Customer Service Centre (CSC) when they receive a call requesting Occupational Therapy Support. It can also be completed by the OT Business Support if a request comes directly into the team. The step can be initiated by clicking on Start on the left-hand side bar on the Person summary page and then selecting **CS Childrens Services Contact**.

The CSC worker/OT Business Support will complete the **CS Childrens Services Contact C0925** form with the **Type of Contact** in Section 2 as **Occupational Therapy Request**. This reveals questions within **Section 3. Occupational Therapy Service Request Only**.

CS Childrens Services Contact : Billy Brown 3549790

CS Childrens Services Contact C0925

**Sections**

- 1. Family / Household Details
- 2. Contact / Referral Details
- 3. Occupational Therapy Service Request Only**
- 4. Outcomes and Next Actions
- 5. Next actions

Indicates completed section

### 3. Occupational Therapy Service Request Only

Occupational Therapy Information

Please check the Person Summary screen before adding Next Actions. If the case has the Occupational Therapy Team recorded as an Involved Team, please add a NFA Next Action and send the clipboard notification - 'CS Information received on an open case' to the OT Involved Worker. If no OT Involved Worker is recorded, send to the notification to the 'CS OT Awaiting Allocation - Inbox'. Alternatively, if no OT Involved Team is recorded, add the Next Action of CS OT Occupational Therapy Request.

If the need is linked to challenging behaviour only, then the referral must be made by a professional who has worked in the home to address that specific issue.

Details of specific areas of Occupational Therapy support being requested.

Please complete details

A message has been added to Section 3 advising the CSC worker to use the requests icon  to send a notification to the OT Involved worker or OT Awaiting Allocation – Inbox if the case is already open to them and further information has been received.

The CSC worker/OT Business Support should complete Section 3 with as much detail as they have received and navigate to Section 5. Next actions once the rest of the sections are completed.

In **Section 5. Next actions**, if the case is not already open to Occupational Therapy, a next action of **CS OT Occupational Therapy Request** should be added and assigned to the **CS Occupational Therapy Team**. If the case is already open to Occupational Therapy, a next action of **CS Information and Advice Provided (NFA)** should be added to avoid creating duplicate steps.

## **Internal Contact – completed by Social Worker**

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An alternative route Occupational Therapy may receive a request is through another Mosaic User such as a Social Worker through an **Internal Contact**.

The information requested is like that required in the OT section of the Childrens Services Contact.

Once completed, a next action of **CS OT Occupational Therapy Request** would be assigned to the **CS Occupational Therapy Team**.

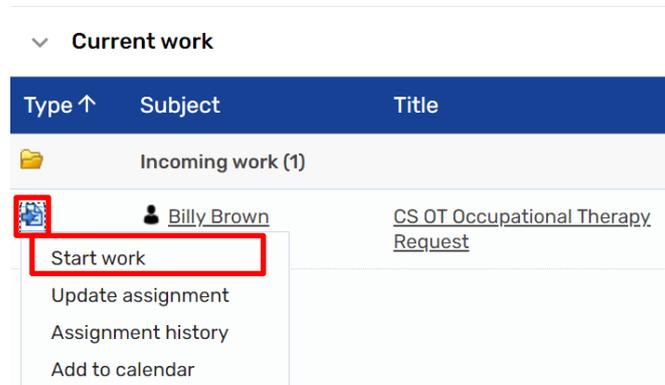
## **Occupational Therapy Request – completed by Practice Supervisors or Advanced Practitioners**

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Those in a managerial role will have access to the Team Inbox which can be accessed from the Full or Narrow workview by clicking on the  Team workview icon.

When the Team workview is opened, all requests into the team can be found in the **Current work** tab.

The Practice Supervisor or Advanced Practitioner processing the request should Start the workstep by clicking on the symbol to the left of the workstep and selecting **Start work**.



A new window will open called **Assign step**; this is asking you if you wish to assign the workstep to yourself as it is currently not in your name specifically. Click **Yes**.

Another new window will display containing the **CS OT Occupational Therapy Request** workstep. The workstep contains the form **CS Occupational Therapy Request C0594** which has 5 sections. Sections 1-3 should have pulled through the information entered into the Childrens Service Contact or Internal Contact. The information will need reviewing and adding to if required.

**Section 4. Authorisation and OT Action** is where the Practice Supervisor or Advanced Practitioner records the outcome of the request. There are also three questions which are mandatory.

The screenshot shows a form with three sections, each with a title and a list of radio button options:

- Main Presenting issue\***
  - Re-Housing
  - ASD
  - Other
- District Council\***
  - City of Lincoln
  - North Kesteven DC
  - South Kesteven DC
  - Boston Borough Council
  - South Holland DC
  - Not Known
  - East Lindsey DC
  - West Lindsey DC
  - Other
- Case Priority\***
  - Priority One - 0 weeks
  - Priority Four - 12 weeks
  - Priority Two - 4 weeks
  - Not Progressed
  - Priority Three - 8 weeks

The outcome of these fields should influence the Practice Supervisor or Advanced Practitioner's rating they give for how quickly the case will be allocated. The **Case Priority** is linked to the next actions in **Section 5. Next actions** so the priority selected will need to match the correct action. The Practice Supervisor or Advanced Practitioner must then add the **date** and clicked the **Signed by** tick box.

In **Section 5. Next actions**, the appropriate action should be taken as a result of the priority selected in Section 4. For example, if **Priority Two – 4 weeks** is selected in the **Case Priority**, in the next actions drop down, **CS OT Proceed to awaiting allocation: Priority Two** would be selected. There are mandatory rules included in Mosaic to ensure the options selected match correctly.

**Next actions**

Select action: -- Please select --

Note: CS OT Proceed to awaiting allocation: Priority One  
CS OT Proceed to awaiting allocation: Priority Two  
CS OT Proceed to awaiting allocation: Priority Three  
CS OT Proceed to awaiting allocation: Priority Four  
CS No Further Action

**Priority**

Urgent  Normal  Low

If the request is not accepted by the team, **CS No Further Action** would be added.

Within the Optional Forms and letters icon , there is the option of two Request Declined letters that can be completed by the Practice Supervisor or Advanced Practitioner (PS/AP).

If the case is proceeding and the appropriate **CS OT Proceed to awaiting allocation** option is selected, a **Scheduled Date** will prepopulate with the corresponding timescales. All the options would be assigned to the **CS OT Awaiting Allocation – Inbox** which is the only dropdown available in the **Pass to worker**.

The PS/AP would then use the  requests icon to send the notification of **CS Placed on Awaiting Allocation List** and send it to Business Support.

**New request**

Select	Request type	Status (date)	Assigned to
<input checked="" type="radio"/>	CS Placed on Awaiting Allocation list		
<input type="radio"/>	CS Please action		
<input type="radio"/>	CS Please review and action		
<input type="radio"/>	CS Request for information		

Note

Pass to worker\*

 This request will be sent when you next save.

The PS/AP can then finish the step using the  finish icon which will close the request and send the next step to the **CS OT Awaiting Allocation – Inbox**.

As part of completing the request, the PS/AP must add on the **Organisational relationship** for the team.

## **Organisational Relationship – completed by Practice Supervisors or Advanced Practitioners**

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Once a request has been accepted, the PS/AP must add the **Organisational relationship**, so CSC are aware the case is open to the team and awaiting allocation. A Worker relationship must also be added once the case has been allocated.

From the **Person summary** screen, click on **Person details** and then **Organisational relationships**.

Click on the **Add** button on the bottom right of the screen and next to **Organisation** click on **Find**.

Find organisation

At least one field marked with a #

Name #

ID #

Street #

Post code #

Other reference #

Sector

Sub sector

Type

In the **Name** field, type in **%occupational** and select **CS Occupational Therapy Team (ID 1000160)**.

**Relationship type** – select **Involved team**

**From** – this should be the date the request was processed

Once completed, click **Save** and then **OK** to take you back to the **Person summary** screen.

## **Accessing the CS OT Awaiting Allocation Inbox – completed by Any Worker within the Occupational Therapy Team**

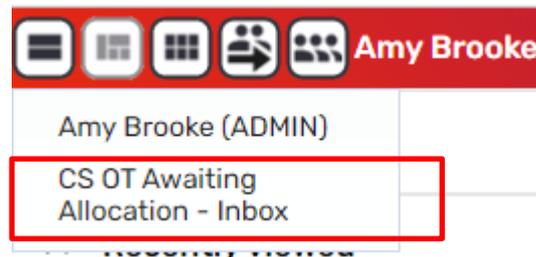
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All workers within the Occupational Therapy Team will have access to the Virtual worker box, **CS OT Awaiting Allocation – Inbox** which is where all these steps are allocated initially.

To access the Virtual worker, the worker should be in the Narrow or Full workview and click on the  act for icon on the top left-hand corner of the screen.



A drop-down menu will appear featuring the worker's name and the **CS OT Awaiting Allocation – Inbox**. The worker should click on the inbox.



The screen will refresh and feature an **Inbox** name where the worker's name used to be.



The **Allocations** and **Current work** will now contain those assigned to the **CS OT Awaiting Allocation – Inbox**.

Using this **Can Act For** button means that all workers have access to the work awaiting allocation and can add information at any time whilst it remains in the virtual worker inbox.

When you wish to return to your own workview, click back onto the  act for icon on the top left and select your own name from the drop down. The screen will refresh to display your own Allocations and Current work.

## CS OT Occupational Therapy Awaiting Allocation – completed by Any Worker within the Occupational Therapy Team

Type	Subject	Title	Status	Priority	Date	Note
Future work (1)						
	Billy Brown (3549790)	CS OT Occupational Therapy Awaiting Allocation	Awaiting Allocation		7 Sep 2023	

The **CS OT Occupational Therapy Awaiting Allocation** should all appear in the **Current work** of the virtual worker. The list can be filtered using the **Date** header so it can be easily seen who is next to be allocated. The date would have been assigned to the step when the priority related next action was added in the Occupational Therapy Request.

### Initial Access by Business Support

The step will first be used by Business Support when they have received the clipboard notification from the PS/AP from the Occupational Therapy Request. Business Support should access the virtual worker to view the corresponding **CS OT Occupational Therapy Awaiting Allocation** step.

From the virtual worker's **Current work**, Business Support should **Start** the workstep which will open form **CS Occupational Therapy Awaiting Allocation C1377**.

They would then use the forms and letters icon to load the **CS OT Referral Letter and Consent C0595**. The Edit recipient button can be used to find the parents/guardians of the child who the letter is to be addressed to. The output document icon can be used to produce a PDF copy of the letter to be posted out to the family.

Business Support would then navigate to **Section 4. Activity Log** and enter that they had sent the letter into the **Log of Telephone Calls, Emails, and Correspondence** table.

## Recording Duty Calls and Correspondence

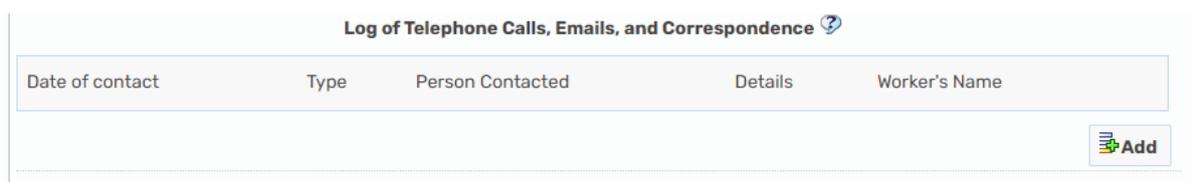
The step can be started when needed by clicking on the symbol to the left of the Workstep Title and selecting **Start work**. If the step has been previously saved by a worker, it will say **Resume work** instead.

Sections 1-3 of the form prepopulate from the previous steps.

At the start of **Section 4. Activity Log**, there is a **Date/time of request** which is the date they entered the waiting list. This date/time has prepopulated from the information entered on the latest contact step. This would only be amended if a 2<sup>nd</sup> referral had been made with further information and the date would need to change back to the 1<sup>st</sup> referral date. The date/time is used to measure timescales against.

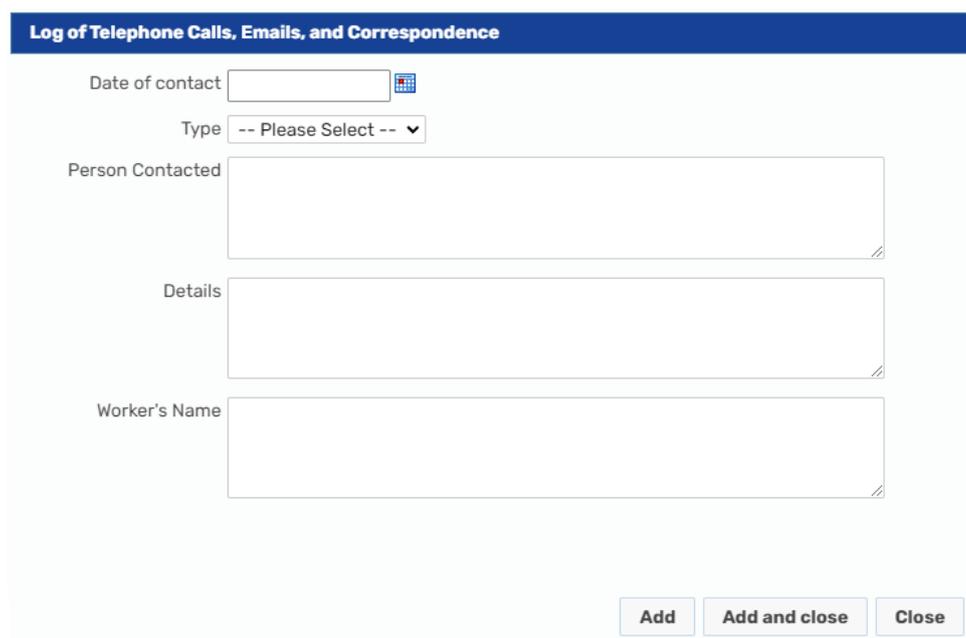
This section is also to be used by any worker who has had any contact or correspondence regarding the case whilst they are on the waiting list.

There is a table titled **Log of Telephone Calls, Emails, and Correspondence** which will be used every time a contact needs to be recorded.



The screenshot shows the header of a table titled "Log of Telephone Calls, Emails, and Correspondence". The table has five columns: "Date of contact", "Type", "Person Contacted", "Details", and "Worker's Name". An "Add" button with a plus icon is located at the bottom right of the table header.

Clicking on **Add** opens further fields allowing you to enter information into the table.



The screenshot shows the form for adding a new entry to the table. The form has a blue header with the title "Log of Telephone Calls, Emails, and Correspondence". Below the header are five input fields: "Date of contact" (with a calendar icon), "Type" (a dropdown menu with "-- Please Select --"), "Person Contacted", "Details", and "Worker's Name". At the bottom of the form are three buttons: "Add", "Add and close", and "Close".

After the information regarding the contact has been added, the **Add** button can be used to add another contact or **Add and Close** when no further information is to be recorded at this time.

If at any point the priority needs to be amended, this can also be entered into the Log table with the **Type of Priority Changed**. The worker recording this information would then use the requests icon  and send the **CS Please review and action** request to the PS/AP to approve the change in priority.

The workstep would then be saved using the save icon  and exited using the close icon  until another contact needs to be added or the case is to be allocated.

## Allocating the case – completed by Practice Supervisors or Advanced Practitioners

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When the scheduled date is approaching and the case is ready to be allocated based on their priority, the PS/AP would Start/Resume the **CS OT Occupational Therapy Awaiting Allocation** form.

They would navigate to Section 4. Activity Log and scroll to the bottom of the section. Here is a subsection called **Allocation Details**.



The screenshot shows a form titled "Allocation Details". It contains a question "Has the case been allocated?\*" with three radio button options: "Yes", "No", and "Duty case". Below the question is a checkbox labeled "Signature".

If the case is to be allocated, the PS/AP would answer **Yes** to **Has the case been allocated?** This opens a mandatory field to enter the **Allocation Date** and they must also tick the **Signature** box. The date added to Allocation Date will influence the timescales for the Assessment.

They would navigate **Section 5. Next actions** and click on the **Add**. It is here they would use the **Select action** to select **CS OT Occupational Therapy Assessment & Plan**. They would use the **Find** next to **Pass to worker** to search for the worker they wish to allocate the case to. They would then use the **Add** button to repeat the process to select the **CS OT Occupational Therapy Casework** and **CS Case**

**Supervision** both to be assigned to the allocated worker. Once the third action has been selected, **Add and Close** and be used to enter the actions into the **Next Action** table.

If the case is not being allocated for whatever reason and is to close, the PS/AP would answer **No** to **Has the case been allocated?** This opens a mandatory field to enter the reason the case is not being allocated.

The PS/AP must enter the **Decision Date** and **Signature**. They would navigate to **Section 5. Next actions** and add the **CS OT Occupational Therapy Case Closure** step and assign it to themselves.

The last option of **Duty case** available under the question **Has the case been allocated?** is for cases that require a low level of support where a full assessment is not needed. Mandatory fields open to enter the **Allocation Date** and they must also tick the **Signature** box. The PS/AP would add **CS OT Occupational Therapy Casework, CS OT Occupational Therapy Plan Review (Duty work only)** and **CS Case Supervision** to the next actions and assign to a specific worker or the **CS OT Awaiting Allocation – Inbox**. These steps will be shared between duty workers.

Once the correct actions have been added, the step can be finished using the finish icon  which will lock down the Awaiting Allocation step and make the added the next actions available.

## **Worker Relationship – completed by Practice Supervisors or Advanced Practitioners**

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Once a case has been allocated, the PS/AP must add the **Worker relationship**, so the child appears in the worker's allocation list and other Mosaic Users are aware the case is open and allocated within the team.

From the **Person summary** screen, click on **Person details** and then **Worker relationships**.

Click on the **Add** button on the bottom right of the screen, next to **Worker** click on **Find**.

A list of workers who have steps allocated on Mosaic will appear at the top of the screen under **Involved workers**. If the worker you have allocated the case to appears here, you can click on their name to select them.

If they do not appear with the Involved workers list, you can search for the worker by entering their **Last Name** and **First Name** and then click on **Find**. The search results will appear under **Other workers** towards the bottom of the screen. Select the worker's name from the results.

The screen will refresh, and you will be able to enter the **Relationship type** as **Involved worker** and the **From Date** should be the date the case was allocated. The **To Date** and **End Reason** would be left blank until the case was closed.

Once completed, click **Save** and then **OK** to take you back to the **Person summary** screen.