

Occupational Therapy Short Term Breaks M & H Documentation

This guide outlines how to access the Short Term Breaks Moving and Handling Documentation depending on where in the OT process the child/young person is.

On an open workflow

If the case is currently open with an Occupational Therapist (OT), the Short Term Breaks Moving and Handling (STB M&H) Documentation can be accessed in the CS OT Moving and Handling Documentation step. This can be added from the CS OT Occupational therapy Assessment & Plan and the CS OT Occupational Therapy Plan Review step as a send immediately next action.

Once the step appears in the OT's Current work, the step can be started. The CS OT Moving and Handling Options Form C1412 will appear. In Section 1. Details, select **CS OT Short Term Breaks M&H Documentation C1420**.

Use the forms and letters icon  to open the corresponding form, **CS OT Short Term Breaks M&H Documentation C1420**. This will appear in a tab across the top.

Some information will prepopulate into this step from the workflow.

In Section 1. Personal Details, the **Next Review Date** will need updating manually to reflect the date the review is due.

Once the form is completed, the OT can return to the CS OT Moving and Handling Options Form C1412 tab. Open **Section 2. Next actions** and add **CS No Further Action**.

The workstep can then be finished using the finish icon .

When at Monitoring

As the workstep is not available to add the Moving and Handling Documentation step, the STB M&H Documentation must be added directly onto the **Documents** from the **Person summary**.

Once Documents has been clicked, **Filed documents** will open displaying the **Forms and letters** tab.

On the bottom right click on **Create** and a list of available forms and letters will appear. Forms are on the left column.

Click on **CS OT Short Term Breaks M&H Documentation C1420** to open the form.

Complete all sections of the document as appropriate.

The form can be saved at any time using the save icon  but can only be accessed again through the Documents using the edit icon . It will not appear in your Current work.

Once the form is complete, the finish icon  can be used to make the form read only.

The CS OT Occupational Therapy Monitoring step can be started/resumed to update the date of the next M&H Documentation review. This does not pull through automatically from information entered directly into Documents and will need amending manually.