Adults Quick Guide

Adult OT Goals and Action Plan

Having identified a person's needs and person centred goals through the **OT Specialist Assessment**, the **OT Goals and Action Plan** is where the plan of how to meet / address these goals is recorded.

The **OT Goals and Action Plan** is added as a **'send immediately'** next action from the assessment.

The **OT Goals and Action Plan** is a dynamic document and as such will remain open and should be continually updated until all planned intervention has been completed.

Recording the Adult OT Goals and Action Plan

To start the **OT Goals and Action Plan** step, 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 **OT Goals and Action Plan** will open in a separate window

Tips for completing the form

Clicking on the **Show guidance** icon will give you prompts to assist in answering 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. There is an option to select 'completed section only' when printing the completed plan to provide to the person / their representative.

Click the **Save** icon 💾 throughout your recording in the form. It is recommended that you save your work whenever you add to / update the form, the more often the better. When you click save for the first time, any mandatory fields will be highlighted in red.

Section 1. Personal Details

Information will prepopulate into the fields marked with the **blue cog** ⚙. If some information is missing or incorrect, it can be added or 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 these fields

Section 2. Goals and Action Planning

Agreeing joint goals and an action plan with the person is the corner stone of Occupational Therapy intervention.

Remember to use the **Show guidance** icons ❓ throughout this section.

Summary of needs

The **Summary of needs** pull through from the **OT Specialist Assessment** (as long as it is finished before this step is opened) but can be edited if required.

Goals

The **Goals** pull through from the **OT Specialist Assessment** (as long as it is finished before this step is opened) but can be edited if required.

You should consider what the person wants to achieve. Goals should be person centred and should directly relate to the needs identified.

It is critical that each goal is numbered so that it aligns to the action to meet the goal (expanded on in the action planning section below)

There is no limit to the number of goals identified and more can be added according to need.

Action Planning

The **Action Planning** section is where the plan to facilitate achievement of the goal is recorded.

You should include all recommended actions, even if they were declined by the person

Click the **Insert Section** button to add a **table per goal** identified. For example, if there are four goals you should see four tables – **Goal – 1**, **Goal – 2**, **Goal – 3** and **Goal 4**

For each goal table:

- Click the **Add** button

- Complete the **Recommended Action** and **Date Action Identified**

Important note: The **Outcome/Review** and **Further Action** fields should only be recorded once the intervention has been evaluated e.g. equipment trialed, DFG completed etc

- Click the **Add and close** button once **Recommended Action** and **Date Action Identified** have been recorded

When intervention to achieve a goal has been evaluated:

- Click the **Edit Pencil** icon 🖉 against the relevant **Recommended Action**

- Complete the **Outcome / Review** and **Further Action** fields

- Click the **Save Changes** button

If further action is required to achieve the goal:

- Click the **Add** button to add a new row (new recommended action) to the table

- Record the new **Recommended Action** and **Date Action Identified**

- Click the **Add and close** button

When a new recommended action requires further work to be completed in Mosaic e.g. for a DFG, adaptation or non-contract special, you will need to record the corresponding **'send immediately'** next action in **section 5**.

You should **repeat** this continuous evaluation, re-assessment and revision of goals until all goals have been achieved and no further action is required.

Concluding summary

The **Concluding summary** should be recorded once the decision is made to close the case (at the end of the OT intervention). You should use this box to summarise the intervention.

Section 3. Completion details

This section should be completed at the end of intervention.

At this point a copy of the finalised plan can be printed and a copy sent to the person or their representative, and any involved professionals, as a final summary and outcome of their OT intervention.

The name, designation and team name of the worker who first opened the **OT Goals and Action Plan** step will appear in this section – you can overtype these details if needed i.e. if you have taken over the case.

You must select the relevant telephone number and email address from the dropdown menus and should amend the date field to the date the form is being completed before printing the form.

You must also answer the two questions in italics at the bottom of this section to state who the document is being provided to. If you answer **No** to either question you will have to record a reason.

Please note: These questions will not appear on the printed document

To print the plan:

- Click the **Output current document** icon – an 'Output Options' window will open

- You should amend the 'Output Options' - The **Next actions** section of your plan will automatically appear on the output unless the 'Output Options' are amended before printing. This section should not be included on any outputs for the person or their representative.

- Click **Output to PDF** – you can refer to the **Printing Documents** user guide if needed

To request Business Support send a copy of the plan for you:

- Click the **Requests** icon 📋

- Select **Adult Admin output request**

- Add a **Note** with specific instructions e.g. if a covering letter is needed, where to post to, if any sections should be excluded etc

- Select **Adult Admin OT** from the Pass to team dropdown menu

- Click the **OK** button

Section 4. Outcomes

This section should be completed at the end of intervention.

Select the appropriate answers from the dropdown menus – the questions you see will vary based on the answer selected to the first question and then subsequent answers

Section 5. Next actions

A next action must be added before the **OT Goals and Action Plan** 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 = Select/Find as appropriate - Not required for NFA actions

- Note = Record any necessary information – recommended when assigning a next action to another team/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 you must tick the **Send Immediately?** checkbox to send most next actions before finishing the **OT Goals and Action Plan**.

Action	When to use	Who to assign to
Adult OT Specialist Assessment	If the need for further OT Specialist Assessment has been identified. **Important:** As per the mandatory reason you must check Current work on the Person Summary before adding this action – there should never be more than one assessment current and underway	Self using the **Assign to Me** button
Adult Moving and Handling Assessment and Plan	If the person requires a Moving and Handling Assessment and Plan	Self using the **Assign to Me** button
Adult Disabled Facilities Grant Request – Private Property/Tenancy Only	If the person requires a DFG adaptation as an updated recommendation in their plan	Self using the **Assign to Me** button
Adult OT Non-Contract Specials	If the person requires a non-contract special item of equipment as an updated recommendation in their plan	Self using the **Assign to Me** button

Action	When to use	Who to assign to
Adult Referral to Extra Care Housing (assign to self)	If the person requires a referral for Extra Care Housing. Refer to the **Referring to Extra Care Housing** user guide for further details. **Important:** An **Adult Internal Contact** must also be completed to refer the person to the relevant Adult Care SW team.	Self using the **Assign to Me** button
Adult Internal Contact (assign to self)	If the person needs involvement from Adult Care SW/CCO. This should **only** be used for cases **not already open** to Adult Care SW/CCO.	Self using the **Assign to Me** button
Adult Referral to Reablement (assign to self)	If the person requires a referral to home based reablement service (Libertas)	Self using the **Assign to Me** button
Adult Referred to ILT (NFA)	If the person has been referred to ILT	This is a terminating (no further action) action, so does not need to be assigned.
Adult Referral to LPFT Mental Health Social Care (assign to self)	If the person needs referring to LPFT for Mental Health Social Care intervention.	Self using the **Assign to Me** button
Adult Adaptation – Other	If the person requires an adaptation for a council property, an adaptation funded by another agency or an adaptation funded by LCC as an updated recommendation in their plan	Self using the **Assign to Me** button

Action	When to use	Who to assign to
Adult Equipment Repair and Replace (NFA)	If the outcome of the plan includes providing repairs to existing equipment or re-issuing replacement equipment items.	This is a terminating (no further action) action, so does not need to be assigned
Adult Telecare Referral	If a referral for LCC commissioned Telecare services is needed as an updated recommendation in their plan	Self using the **Assign to Me** button
Adult Referral Maximising Independence	If it is felt the person would benefit from support from the maximising independence service	Self using the **Assign to Me** button
Adult Safeguarding Concern	If safeguarding concerns have been identified	Self using the **Assign to Me** button
Adult Referral to Other Agency	If the case needs to be referred to an external agency	Self using the **Assign to Me** button
Adult Referral to LSS (NFA)	If a person has been referred to the Lincolnshire Sensory Service	This is a terminating (no further action) action, so does not need to be assigned
Adult Information and Advice Provided (NFA)	If information and advice has been provided	This is a terminating (no further action) action, so does not need to be assigned
Adult Referral to Wellbeing (assign to self)	If a case requires screening for the Wellbeing Service	Self using the **Assign to Me** button

Action	When to use	Who to assign to
Adult No Further Action Required	If no further action is required, and a full case closure cannot be completed e.g. because the case is open to LCC Adult Care or LPFT.	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, e.g. the person does not have any open ongoing services or involvements Refer to the **Case Closures – Full, Team and Involvement** user guide for further information	Self using the **Assign to Me** button
Adult Case Closure Already Started (NFA)	If a full case closure is required and is already underway. To add this action, you must be able to see **Adult Proposed Case Closure** or **Adult Case Closure in Progress** within **Current work** on the **Person summary** screen	This is a terminating (no further action) action, so does not need to be assigned

Toolbar Icons

While completing and before finishing the plan you should always consider whether you need to use any of the toolbar icons at the top of the screen.

You should use the **View documents** icon to attach relevant supporting documents created outside of Mosaic.

There are optional forms and letters you may need to complete, accessed via the **Forms and letters** icon.

There are requests and notifications available from the **Requests** icon that you may need to send.

Request (R) / Notification (N)	When to use	Who to assign to
(R) Adult Please review information and authorise	Optional authorisation.	Your manager / Level 2 OT using the Pass to worker > Find button
(N) Adult Admin output request	To be used to request Business Support generate a letter and/or finished version of the plan form and post it out to the person/their representative etc You should use the 'note' field to give specific details.	**Adult Admin OT** using the Pass to team dropdown menu
(R) Adult Please convene Best Interest meeting / send invitations	To be used to request the Safeguarding and Review team arrange a Best Interest Decision Making meeting and/or send out the meeting invitations The optional form **Adult Best Interest Meeting Invitation List** should be completed to provide sufficient information for admin to complete this request	**Adult Safeguarding – Meeting** using the Pass to worker dropdown menu
(R) Adult Best Interest meeting cancellation	To be used to request the Safeguarding and Review team cancel a Best Interest Decision Making meeting	**Adult Safeguarding – Meeting** using the Pass to worker dropdown menu
(R) Adult Best Interest meeting re-arrangement	To be used to request the Safeguarding and Review team re-arrange a Best Interest Decision Making meeting	**Adult Safeguarding – Meeting** using the Pass to worker dropdown menu
(R) Adult Please action	This request appears in most workflow steps and can be used as and where required	Another worker or team using the Find button

Clicking the **Finish** icon ✅ will finish and complete the **OT Goals and Action Plan**. It should only be finished at the end of all current OT case activity. Once the **Finish** icon can be clicked, it will lock down your step and no further input can be made.

> **Important:**
>
> - The OT Goals and Action Plan should remain open as 'Incomplete work' until current OT case activity is complete
>
> - If the case is transferring to another OT/CCO the OT Goals and Action Plan should be reassigned to them**
>
> - If the case is open and awaiting a DFG / Adaptation the OT Goals and Action Plan should be reassigned to the Team's Inbox (DFG)**
>
> The above points are also true for the **OT Casework Record**. Please refer to the **OT Casework Record** user guide for further details

**To reassign the OT Goals and Action Plan to another worker / Team inbox:

- Exit the step using the **Close** icon ❌ - click **Yes** to save any changes

- Click the **Incomplete work** icon 📝 to the left of the **OT Goals and Action Plan** in the **Current work** section

- Click **Update assignment** from the mini menu

- In the Team worker dropdown menu select the relevant named worker or Team Inbox (usually DFG)

- Add a **Note** to highlight why the case is ongoing and the step is being reassigned

- Click **OK** button – the **OT Goals and Action Plan** will be reassigned to the worker / inbox

Please note: Alternatively the **OT Goals and Action Plan** can assigned in 'bulk' i.e. at the same time as the **OT Casework Record.** Refer to the **Assigning Work** user guide for further details