Children's Services Quick Guide

Occupational Therapy Case Closure

This guide outlines how to complete the Occupational Therapy Case Closure step so that the outcomes table prepopulates into the letters.

Completing the Occupational Therapy Closure Record C0103

The Occupational Therapist (OT) must complete Section 1. Service Closure Record.

The **Outcomes of Occupational Therapy Intervention at Case Closure** will prepopulate from the Occupational Therapy Assessment & Plan or Occupational Therapy Plan Review step. This can be amended as appropriate in this closure step.

Outcomes of Occupational Therapy Interventions at Case Closure					
Date identified	Identified Need	Outcome Achieved	Date	Reasons / Comments	
13/02/2023	Help Charlie's parents move him around the house	Yes	28/02/2023	Stair lift has been fitted and Charlie can get upstairs to the bathoom easier	✏️ 🗑️
20/04/2023	Enable Charlie to shower on his own	Yes	31/05/2023	Hand rails and supports added to the family bathroom	📇 ✏️ 🗑️
					📇 Add

The edit icon 🖊️ can be used to amend the information, the delete icon 🗑️ can be used to remove rows and the Add button can be used to add further details. The move icon 📇 can be used to alter the order of the table.

Once any amendments have been made, use the save icon 💾 to save the form before clicking on the Optional Forms and Letters icon to load any letters required.

Once saved, the updated Outcomes table will pull through to the letters.

If the child is to be placed on the Monitoring list, make a note of Earliest review due date. You will need this if adding the next action of CS OT Occupational Therapy Monitoring.

The OT will then complete Section 3. Next actions adding either the **CS OT Occupational Therapy Monitoring** (amend the Scheduled Date to match the Earliest review due date) or **CS OT Case Closed (NFA)**.

Completing the Closure Letter

Within the step, the forms and letters icon 📧 can be used to access the **CS OT Closure Letter C1253** and the **CS OT Feedback Letter C0703**.

Any letters opened will appear as a tab at the top of the workstep. If a letter has been added in error, it can be deleted using the delete icon 🗑.
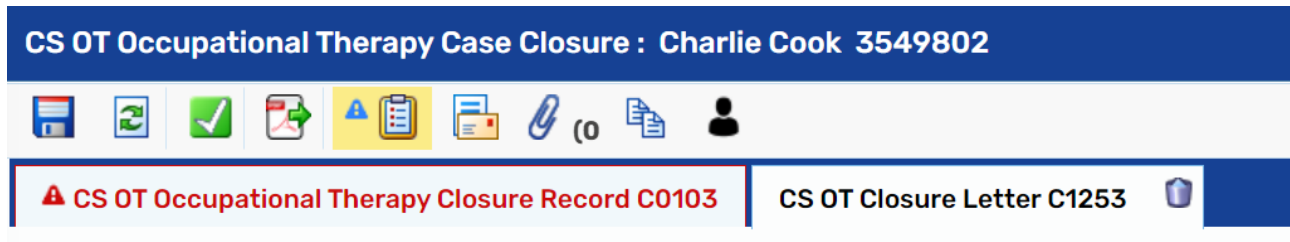
To complete the letter:
- Use the **Edit** button in the yellow banner, click on **Add Recipient** under **Primary recipient**.
- Four tabs appear on the Find party window, **Find person, Find worker, Find organisation** and **Manual input**. Use the appropriate tab to find the individual you are looking for.
- The **Edit letter recipient details** appears, this can be amended as appropriate. If you are sending the letter to parents who live at the same address, you only need to find one parent and amend the details here to contain both parents.

- Click **Save changes**
- Use **Add Recipient** to add all the people you wish to send a letter to. One letter will be produced for each row of the table.

- Click **Close**
- On the **OT Closure Letter C1253**, there are two sections. Complete the dropdowns in Section 1. Case Closure Letter. Section 2. Plan details will pull through the last version of the Outcomes which was updated and saved in the Closure Record form. If this is not the correct version, you will need to delete the letter, save the workstep and then open the letter again using the forms and letters icon 📧.
- The letter can then be printed using the Output to PDF icon 📄 or the 📋 requests icon can be used to send the **CS Business Support: Please send closure letter** notification to business support.
- The OT can also complete the **CS OT Feedback Letter C0703** in the same way for Business Support to distribute.
- If the OT has requested Business Support to post the letters, the section **Closure letter(s) requested to be sent to** and the **Date requested** should be completed.
- Business Support can access and add recipients for the CS OT Feedback Letter C0703 from this closure workstep if it is still open. If the OT has already completed the Feedback letter, it will display within the Workstep summary or Documents to print, the same way they will print the Closure letter. Alternatively, the Feedback letters can be created at any time from the Documents on the Person summary page.

Sending for authorisation

The OT should use the 📋 request icon to send the mandatory request, **CS Manager: Please review and authorise** and use the **Pass to worker** to find their manager.

| New request			
Select	**Request type**	**Status (date)** ▲	**Assigned to**
◯	**Required** CS Manager: Please review and authorise	📋	
◯	CS Business Support: Please send closure letter	📋	
◯	CS Please action	📋	

Note [   ]

ⓘ This request will be sent when you next save.

OK   Cancel

Click **OK** and then save and exit the step. Once the manager has authorised the closure, the step can be finished with the finish icon ✅.

Completing the Feedback Letter

Once this step has been finished, if the feedback letter was not completed by the OT, it can be accessed from the Documents on the Person summary page by Business Support.

- When Documents is open, the Forms and letters tab will show.
- Click on the **Create** at the bottom right of the window.
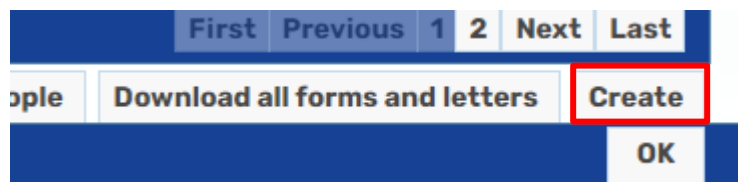
- A list of forms and letters will display with Letters appearing on the right-hand column. Click on **CS OT Feedback Letter C0703** to open the letter.
- Use the **Edit** button in the yellow banner, click on **Add Recipient** under **Primary recipient**.
- Four tabs appear on the Find party window, **Find person, Find worker, Find organisation** and **Manual input**. Use the appropriate tab to find the individual you are looking for.
- The **Edit letter recipient details** appears, this can be amended as appropriate. If you are sending the letter to parents who live at the same address, you only need to find one parent and amend the details here to contain both parents.
- Click **Close** once all recipients have been added.
- The rest of the letter in both Section 1 & 2 should prepopulate information. Business Support may want to amend the Worker name at the bottom of Section 1 to reflect the team or OT.
- Once completed, a copy of the letter(s) can be created as a PDF using the output to PDF icon 📄.
- The letter can be saved using the save icon 💾 to be edited again later but when finished, the finish icon ✅ should be used to make the letter read only.