

ESSENTIAL ADAPTATION WORK- PRIVATE PROPERTY IMPROVEMENT GRANT
INTERIM (HIG) PROCEDURE

	STAGE	DATE AGREED
1	Assessment visit(s) completed and possible options for adaptations discussed with client	
2	Ownership of property confirmed and discuss ongoing servicing and maintenance liability if adaptation is approved. Record in notes/ Ax.	
3	Senior OT consulted, joint visit if necessary	
4	Assessment report written by OT detailing outcome of assessment and recommendations	
5	Complete Sector panel for equipment/ adaptations case note and workflow to local approvals box for review by Senior OT.	
6	Local Adaptations Panel agreement	
7	City Panel submission as appropriate (expected costs of £20K or more or setting a precedence). Submission by email via Senior OT.	
8	OT updates client with outcome of panel(s).	
9	Independent technical advice sought if appropriate. Who meets costs if work does not proceed to be discussed.	
10	OT signs "in principle" letter 1 of support following confirmation with SOT and this is emailed to Adaptations team**. Copy sent to client. Save copy of letter.	
11	Adaptations team sends Grant Application to client to complete. Customer completes HIG application form and returns to adaptations team who then sends grants letter out confirming % entitlement- copy of letter emailed to OT.	
12	Client appoints architect/technical advisor who contacts OT to discuss proposals/carry out joint visit as appropriate. Discuss any works wished out with grant approval criteria.	
13	Plans/Technical drawings for Building Warrant sent to OT for approval and discussion with client	
14	Plans/Technical drawings for Building Warrant discussed and agreed with Senior OT. Save copies in G Drive.	
15	OT signs the "Formal Support" letter 2 after review by SOT and it is emailed to adaptations team with agreed plan, copy to client + architect** Save copy of letter.	
16	Client/architect sends all relevant plans, consents and tenders to Adaptations team	
17	OT contact with the client may cease or continue as appropriate between stages 13-16	

18	Adaptations team write to client to giving formal approval for work to commence, copy emailed to OT. No work should start before this is given	
19	OT to be notified, and prestart visit completed with client, architect and contractor to confirm approved works and start date. Confirm any works out with grant approval.	
20	OT to visit during progress of work as required to advise on location of fittings such as rails.	
21	Client/architect contacts OT when work is completed.	
22	OT visits the client to check that work has been carried out to agreed specifications and meets clients needs	
23	OT sign and emails "Satisfactory Completion" letter 3 to Adaptations Team, copy to architect and client.** Save copy of letter.	
24	Client/architect sends copies of final accounts, fee invoices as applicable, and Completion Certificate to Adaptations Team for payments to be made.	

Senior OT to check documents for each stage

** denote standard letter used

Removable items: ongoing maintenance liability to be discussed and recorded - see Senior OT.