

SEND Process

In this guide:

Introduction	2
SEND EHC Request – completed by SEND Assistant Caseworker	2
SEND EHC Request Evaluation – completed by SEND Assistant Caseworker / SEND Caseworker	4
SEND EHC Needs Assessment – completed by SEND Caseworker	5
SEND Draft EHC Plan – completed by SEND Caseworker	7
SEND Final EHC Plan – completed by SEND Caseworker	8
SEND EHC Plan Review – completed by SEND Business Support Annual Review worker / SEND Caseworker	10
CS Placement Request - completed by SEND Caseworker	12
SEND EHC Plan Amendment Notice / OLA Transfer - completed by SEND Caseworker	13
SEND Amended / OLA Transfer Final EHC Plan - completed by SEND Caseworker	15
SEND EHC Case Closure – completed by SEND Caseworker / SEND Practice Supervisor	16
SEND Mediation Services– completed by SEND Practice Supervisor	19
SEND Tribunal– completed by SEND Practice Supervisor	19

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

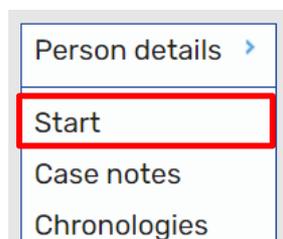
The **SEND EHC process** will be initiated on Mosaic when a contact is received for an **EHC Needs Assessment**. This may be received by phone or web portal from a young person, school, parent or professional, or it may be received for a Transfer In of an EHC Plan from another Local Authority. Either way, upon searching for and accessing the young person's record, the first workstep that must be initiated on Mosaic is the **SEND EHC Request**.

This guidance details who it is anticipated will complete each step however this can be delegated within the team dependent on service need and demand.

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

SEND EHC Request – completed by SEND Assistant Caseworker

When a contact is received for an EHC Needs Assessment or a Transfer in EHC Plan, the EHC worker can generate the **SEND EHC Request step** from the **Start menu** on the left hand **side bar menu** on the **Person summary** screen.



Within the Start menu, the EHC worker must select the **SEND EHC Request** step. Once selected, the **SEND EHC Request C0160** form will display.

SEND EHC Request : Chloe Cook 3549818

SEND EHC Request C0160

Sections

- 1. Request Information
- 2. Next actions

*Indicates required field

Name	Gender	Date of Birth	Ethnicity	Sub Ethnicity
Chloe Cook	Female	05/09/2017	White	British

Request Type*

Request for EHC Needs Assessment
 Transfer of EHC / Statement from OLA
 Request for EHC Needs Assessment with Exceptional Circumstances

Request for Medical Funding
 Consideration of SEND Assessment from OLA

Date of Request *

This form allows the worker to record the content of the referral received and to attach any paperwork to the step by selecting the  view documents icon.

Section 1. Request Information contains several mandatory questions that must be completed such as the **Request Type, Request Source and Request Outcome.**

Please note: It is vital that the date of request is accurate as this is used throughout the SEND workflow to calculate timescales.

If **Transfer of EHC/Statement from OLA** is required, a further date field will display asking for the date of last annual review.

Once the request form has been completed, the worker must navigate to **Section 2. Next actions** and select **SEND EHC Request Evaluation** from the Select action drop down menu. The worker must then click **Assign To Me**, or use **Find** to assign to a colleague, followed by **Add and Close.**

Once all the relevant fields have been completed and the next actions have been selected, the worker must click the  finish icon to **finish the step.**

Please note: If medical funding is required, the SEND Medical Funding action must be added. This will allow the worker access to the relevant forms for requesting and recording medical funding.

SEND EHC Request Evaluation – completed by SEND Assistant Caseworker / SEND Caseworker

Once generated as a next action within the SEND EHC Request, a SEND EHC Request Evaluation workstep will appear in the **Incoming work folder** within the **Current work** of the Assistant Caseworker.

Current work

Type ↓	Subject	Title	Status	Priority	Date	Note
	Alerts (2)					
	Future work (9)					
	Incomplete work (20)					
	Incoming requests (4)					
	Incoming work (22)					
	Chloe Cook (3549818)	SEND EHC Request Evaluation			10 May 2023	

The workstep can be opened by clicking on the **title SEND EHC Request Evaluation hyperlink** and selecting **Start** from the menu that appears in the **Workstep summary screen**. The SEND EHC Request Evaluation step will also be available in the Current work box on the Person summary screen for the young person.

In **Section 1. EHC Request Evaluation** the majority of the information in Section 1 pre-populates from the Person summary screen or maps from the previous **SEND EHC Request**.

There are also tables for recording the **Request Acknowledgement / Notification** and **Agency Information Gathering**. To populate these tables, the worker must first click the Find button.

Request Acknowledgement/Notification			
Name	Agency	Date Letter Sent	Comments

Agency Information Gathering						
Name	Agency	Info Received with Request	Date of Information Request	Date Info Chased	Date Info Received	Date PCP Meeting Advised

This will enable the worker to complete the fields within the table.

Section 2. SEND Allocation Meeting contains fields where the worker can record the dates of the **Allocation meeting** and **Decision**. The **Request Needs Assessment Timeline** uses the date recorded in the **SEND EHC Request** to calculate the timescale for different meetings/reviews.

Section 3. Outcomes is used to record the outcome of the request as well as the Date of decision.

Once the Request Evaluation form has been completed, the worker must navigate to **Section 4. Next actions** and select the relevant next action, dependent on the outcome of the Allocation meeting, from the Select action drop down menu. The worker must then use **Assign To Me** or click **Find** and assign to the relevant worker dependent on the next action selected, followed by **Add and Close**.

Once all the relevant fields have been completed and the next actions have been selected, the worker must click the  finish icon to **finish the step**.

Workers can also transfer a case to Adult Care within the Request Evaluation step by adding **SC Transition to Adult Care Process** as a next action.

Please note: If the EHC Plan has transferred from another Local Authority, the next action that must be selected is **SEND Final EHC Plan (Transfer In from Other Local Authority)**, which will bypass several steps in the process.

SEND EHC Needs Assessment – completed by SEND Caseworker

Once generated as a next action within the SEND EHC Request Evaluation, a **SEND EHC Needs Assessment** workstep will appear in the **Incoming work folder** within the **Current work** of the Caseworker.

Current work

Type ↓	Subject	Title	Status	Priority	Date	Note
	Incoming work (3)					
	 Chloe Cook (3549818)	SEND EHC Needs Assessment			10 May 2023	

The workstep can be opened by clicking on the **title SEND EHC Needs Assessment hyperlink** and selecting **Start** from the menu that appears in the **Workstep summary screen**. The SEND EHC Needs Assessment step will also be available in the Current work on the Person summary screen for the young person.

Once started, the **SEND EHC Needs Assessment Record C0943** form will display.

SEND EHC Needs Assessment : Chloe Cook 3549818

SEND EHC Needs Assessment Record C0943

Sections	1. SEND Needs Assessment
1. SEND Needs Assessment	
2. SEND Agency Hub Decisions	
3. Outcomes	
4. Next actions	

Name Gender Date of Birth

Chloe Cook Female 05/09/2017

Is this a re-assessment?*

No Yes

Request Timeline

16 week date 21/08/2023

20 week date 18/09/2023

Section 1. SEND Needs Assessment contains a mandatory question regarding re-assessment and also fields to update regarding the request timeline.

Section 2. SEND Agency Hub Decisions contains a mandatory field where the worker can record the Agency Hub Meeting Decision and the Date decision communicated along with other fields to record details of the **Decision Meeting** and **Decision communicated outcome**.

Section 3. Outcomes contains a mandatory question regarding EHC needs assessment outcome along with a mandatory tick box of Decision recorded by.

Once the needs assessment form has been completed, the worker must navigate to **Section 4. Next actions**. They should select the relevant next action dependent on the outcome of the assessment such as the **CS Develop or Update EHC Draft Plan**. The worker must then click **Assign To Me** followed by **Add and Close**.

Once all the relevant fields have been completed and the next actions have been selected, the worker must click the  finish icon to **finish the step**.

SEND Draft EHC Plan – completed by SEND Caseworker

Information from the assessment pulls through to this step and the plan remains a 'draft' until it has been circulated to the family and education setting. Once all parties have fed back and agreed it will be converted into a Final Plan.

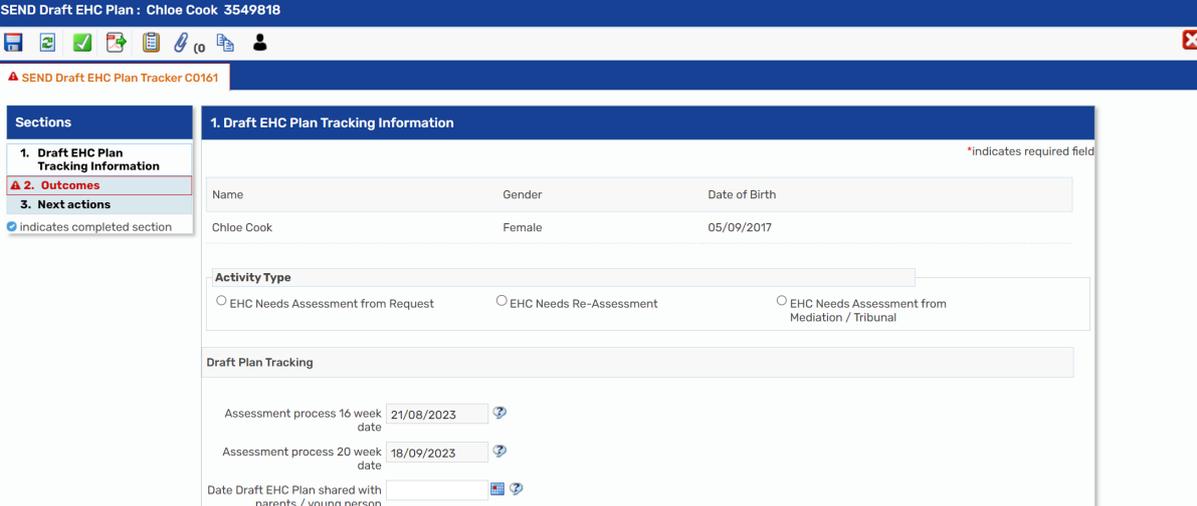
Once generated as a next action within the SEND EHC Needs Assessment, a SEND Draft EHC Plan workstep will appear in the **Incoming work folder** within the **Current work** of the Caseworker.

Current work

Type ↓	Subject	Title	Status	Priority	Date	Note
	Incoming work (3)					
	 Chloe Cook (3549818)	SEND Draft EHC Plan			10 May 2023	

The workstep can be opened by clicking on the **title SEND Draft EHC Plan hyperlink** and selecting **Start** from the menu that appears in the **Workstep summary screen**. The SEND Draft EHC Plan step will also be available in the Current work box on the Person summary screen for the young person.

Once started, the **SEND Draft EHC Plan Tracker C0161** form will display.



SEND Draft EHC Plan : Chloe Cook 3549818

SEND Draft EHC Plan Tracker C0161

Sections

- 1. Draft EHC Plan Tracking Information
- 2. Outcomes
- 3. Next actions

Indicates completed section

1. Draft EHC Plan Tracking Information *Indicates required field

Name	Gender	Date of Birth
Chloe Cook	Female	05/09/2017

Activity Type

EHC Needs Assessment from Request EHC Needs Re-Assessment EHC Needs Assessment from Mediation / Tribunal

Draft Plan Tracking

Assessment process 16 week date: 21/08/2023

Assessment process 20 week date: 18/09/2023

Date Draft EHC Plan shared with parents / young person:

Section 1. Draft EHC Plan Tracking Information contains fields where the worker can record the **Activity Type** and the **Draft Plan Tracking** information. Some information will prepopulate from the Assessment step such as the **Agency Hub Meeting Decision**.

Section 2. Outcomes contains a mandatory field regarding the EHC Draft Plan Outcome and mandatory tick box of Decision recorded by.

Once the draft plan form has been completed, the worker must navigate to **Section 3. Next actions** and use the Select actions to select **SEND Final EHC Plan** or other action dependent on the outcome from the drop down menu. The worker must then click **Assign To Me** followed by **Add and Close**.

Once all the relevant fields have been completed and the next actions have been selected, the worker must click the  finish icon to **finish the step**.

SEND Final EHC Plan – completed by SEND Caseworker

Once agreed, the information in the Draft Plan forms the Final Plan.

Once generated as a next action within the SEND Draft EHC Plan, a SEND Final EHC Plan workstep will appear in the **Incoming work folder** within the **Current work** of the Caseworker.

▼ Current work

Type ↓	Subject	Title	Status	Priority	Date
	Incoming work (3)				
	 Chloe Cook (3549818)	SEND Final EHC Plan			10 May 2023

The workstep can be opened by clicking on the title **SEND Final EHC Plan hyperlink** and selecting **Start** from the menu that appears in the Workstep summary screen. The SEND Final EHC Plan step will also be available in the Current work box on the person summary screen for the young person.

Once started, the **SEND Final EHC Plan Tracker C1158** form will display.

SEND Final EHC Plan : Chloe Cook 3549818

SEND Final EHC Plan Tracker C1158

Sections

- ▲ 1. Final EHC Plan Tracking Information
- 2. Consultations
- 3. Additional Funding Approval
- ▲ 4. Outcomes
- 5. Next actions

● Indicates completed section

1. Final EHC Plan Tracking Information *Indicates required field

Name	Gender	Date of Birth
Chloe Cook	Female	05/09/2017

Request Date - Temporarily editable for transfer to new workflow only*

Tracking Dates

Date Final EHC Plan signed*

Placement named in Final EHC Plan

Funding amount £

Other / additional funding agreed £

Higher Needs funding value £

Has a personal budget been requested?

Yes No

Section 1. Final EHC Plan Tracking Information contains mandatory fields including **Date Final EHC Plan signed** and **Date Final Plan sent to parents / young person** that must be completed. There is also a tick box to confirm the **category of need** has been updated within the Education Summary screen.

Section 2. Consultations contains fields to record any consultations undertaken whilst trying to find a setting.

Section 3. Additional Funding Approval can be used to record another level of funding requested if a school cannot be found.

Section 4. Outcomes contains a mandatory field to select the **Initial EHC Final Plan/Amended Final Plan Outcome** (dependent on whether a setting has been named or not) and a mandatory tick box of **Decision recorded by**.

Once the final plan form has been completed, the worker must navigate to **Section 5. Next actions** and select **SEND EHC Plan Review** (or other relevant next actions dependent on the outcome of the Final Plan) from the Select action drop down menu. The Scheduled Date field will prepopulate with a date roughly 11 months in the future. The worker must then click **Assign To Me** followed by **Add and Close**.

Once all the relevant fields have been completed and the next actions have been selected, the worker must click the  final icon to **finish the step**.

SEND EHC Plan Review – completed by SEND Business Support Annual Review worker / SEND Caseworker

This step can also be started to add the actions to amend the plan without the review meeting taking place; for example to change the named setting.

Once generated as a next action within the SEND Final EHC Plan, a **SEND EHC Plan Review** workstep will appear in the **Future work folder** within the **Current work** of the Caseworker.

Current work

Type ↓	Subject	Title	Status	Priority	Date
	Future work (1)				
	Chloe Cook (3549818)	SEND EHC Plan Review			22 Apr 2024

The workstep can be opened by clicking on the title **SEND EHC Plan Review** **hyperlink** and selecting **Start** from the menu that appears in the **Workstep summary screen**. The SEND EHC Plan Review step will also be available in the Current work box on the Person summary screen for the young person.

Once started, the **SEND EHC Plan Review C0295** will display.

SEND EHC Plan Review : Chloe Cook 3549818

SEND EHC Plan Review C0295

Sections

- 1. Education, Health and Care Plan Review
- 2. Next actions

Indicates completed section

1. Education, Health and Care Plan Review

Name: Chloe Cook, Gender: Female, Date of Birth: 05/09/2017

Type of review: First, Subsequent

Has a Review Meeting taken place?: Yes, complete date below, No, schedule next Review, No, reassessment agreed

Please select Type of review

The SEND Business Support Worker may initiate the workstep and can use the **clipboard requests** icon to alert the Caseworker that the information is available for them to review and record.

Section 1. Education, Health and Care Plan Review contains several fields where the worker can record the details of the review meeting and the mandatory Review

Outcome. The **Review Outcome** selected will determine the **Next Actions** in Section 2.

Once an outcome has been recorded, the Caseworker can use the clipboard request icon  to send one of the following requests to Business Support to ask them to send the appropriate letter.

- **CS Business Support: Please send cease to maintain letter**
- **CS Business Support: Please send intent to amend letter**
- **CS Business Support: Please send no change letter**

The request will be sent to the virtual worker, **CS SEND Annual Review – Business Support** so those Business Support with access to this box can process the letter.

Once the **SEND EHC Plan Review** form has been completed, the worker must navigate to **Section 2. Next actions** and select the relevant next actions from the Select action drop down menu as follows:

- If amendments are required to the EHC Plan, the worker would select **SEND EHC Plan Amendment Notice / OLA Transfer** as the next action and click Find and assign to Caseworker
- If no amendments are required to the plan, the worker would select **SEND EHC Plan Review (no amendments required)** as the next action and click Find and assign to Caseworker
- If a new assessment is required, the worker would add **SEND EHC Needs Assessment** as the next action and click Find and assign to Caseworker
- If the case is closing to the SEND Team, the worker would add **SEND EHC Case Closure** as the next action and click Find and assign to Caseworker

Other actions may be added alongside these such as **CS Placement Request**, **SEND Purchase Request** or **Internal Contact**. Once all the relevant fields have been completed and the next actions have been selected, the worker must click the  finish icon to **finish the step**.

Please note: There is a separate guide which outlines how to complete a SEND Purchase Request for recording school funding. This guide is named **SEND Purchase Request** and can be found on the Mosaic Hub.

CS Placement Request - completed by SEND Caseworker

The **CS Placement Request** is a Send immediately next action from the following steps:

- **SEND EHC Request Evaluation**
- **SEND EHC Needs Assessment**
- **SEND Draft EHC Plan**
- **SEND Final EHC Plan**
- **SEND EHC Plan Review**
- **SEND Mediation Services**
- **SEND Tribunal**
- **SEND Amended / OLA Transfer Final EHC Plan**
- **SEND EHC Plan Amendment Notice / OLA Transfer**

Once added as a next action, it will appear in the Caseworker's **Current work** and the step can be started.

In Section 1. **Are you a Social Worker completing this request for a Child in Care?** – Answer **No**

Checked and completed by – this should be ticked to confirm you understand any previously completed information will prepopulate and needs reviewing and updating.

What type of placement request is this? – please select **External** and then the corresponding type of either **Independent Non-Maintained (Special) School (INMS)** or **Alternative Provision** placements.

Relevant fields will then display once a type has been selected. For the remaining fields in Section 1 -3, complete as thoroughly as possible. Some are mandatory and will need completing to finish the step.

Section 4. Next actions

The next action selected here should reflect the type of placement requested in Section 1. For SEND Placement Requests, you will always select the following:

- **CS Commissioned Placement Request – Pass to worker – CS Commissioned Placement – Inbox**

There are rules which link the placement type to the action that should be selected, if you do not select the correct action that is linked to the type, a red warning will display highlighting what should be added.

Once the Placement Request step has been completed, it can be finished using the finish icon . This will send next action to the Commissioning Team to identify a placement.

SEND EHC Plan Amendment Notice / OLA Transfer - completed by SEND Caseworker

Please note: this step will also be used for SCANs where the decision has been made in agreement for a transfer to an EHC plan.

Once generated as a next action within the SEND EHC Plan Review, a **SEND EHC Plan Amendment Notice / OLA Transfer** workstep will appear in the **Incoming work folder** within the **Current work** of the Caseworker.

▼ Current work

Type ↓	Subject	Title	Status	Priority	Date
	Incoming work (3)				
	 Chloe Cook (3549818)	SEND EHC Plan Amendment Notice / OLA Transfer			18 May 2023

The workstep can be opened by clicking on the title **SEND EHC Plan Amendment Notice / OLA Transfer** hyperlink and selecting **Start** from the menu that appears in the **Workstep summary screen**.

The **SEND EHC Plan Amendment Notice / OLA Transfer** step will also be available in the Current work widget on the Person summary screen for the young person.

Once started, the **SEND EHC Amendment Notice Tracking C1308** form will display.

SEND EHC Plan Amendment Notice / OLA Transfer : Chloe Cook 3549818

SEND EHC Amendment Notice Tracking C1308

1. Amendment Notice Tracking Information		
Name	Gender	DOB
Chloe Cook	Female	05/09/2017
Amendment Notice Tracking		
Date Review / Mediation / Tribunal Meeting held	08/05/2023	
Date Amendment Notice shared with parents / young person	<input type="text"/>	
Date Amendment Notice feedback due	<input type="text"/>	
Amendment Notice feedback received?		
<input type="radio"/> Yes <input type="radio"/> No		

Please note: This step will be used to record if amendments to the SEND EHC Plan are required following a Review or following Mediation / Tribunal.

Section 1. Amendment Notice Tracking Information contains fields to record the date of Review and whether Amendment Notice feedback was received, as well as the Parental/young person's Education Setting Preference.

Section 2. Additional Funding Approval (where required) contains all the relevant fields to record any requests for Additional Resources.

Section 3. Outcomes contains a mandatory field to select the EHC Amendment Notice Outcome and a mandatory tick box of Decision recorded by.

Once the Amendment Notice form has been completed, the worker must navigate to **Section 4. Next actions** and select the relevant next action from the Select action drop down menu.

The next actions available from this step are similar to those available from the original **Draft EHC** plan step.

Once all the relevant fields have been completed and the next actions have been selected, the worker must click the  finish icon to **finish the step**.

SEND Amended / OLA Transfer Final EHC Plan - completed by SEND Caseworker

Once generated as a next action within the SEND EHC Plan Amendment Notice / OLA Transfer, a **SEND Amended / OLA Transfer Final EHC Plan** workstep will appear in the **Incoming work folder** within the **Current work** of the Caseworker.

▼ Current work

Type ↓	Subject	Title	Status	Priority	Date
	Incoming work (3)				
	Chloe Cook (3549818)	SEND Amended / OLA Transfer Final EHC Plan			18 May 2023

The workstep can be opened by clicking on the title **SEND Amended / OLA Transfer Final EHC Plan** hyperlink and selecting **Start** from the menu that appears in the **Workstep summary screen**. The SEND Amended / OLA Transfer Final EHC Plan step will also be available in the Current work box on the Person summary screen for the young person.

Once started, the **SEND Amended Final EHC Plan C1311** will display.

SEND Amended / OLA Transfer Final EHC Plan : Chloe Cook 3549818

▲ -SEND Amended Final EHC Plan C1311

Sections

- ▲ 1. EHC Amended Final Plan Tracking
- 2. Consultations
- 3. Additional Funding Approval
- ▲ 4. Outcomes
- 5. Next actions

● indicates completed section

1. EHC Amended Final Plan Tracking

Name	Gender	Date of Birth
Chloe Cook	Female	05/09/2017

Date Amended Final EHC Plan issued

Placement named in Amended Final EHC Plan

Current funding in addition to delegated funding (per annum) attached to Amended Final EHC Plan £

Confirmed by

▲ Tick signature box above to confirm education organisation relationship is up to date and purchase request completed as required

Date Amended Final EHC Plan sent to parents / young person

▲ Please complete

Date Amended Final EHC Plan

Section 1. EHC Amended Final Plan Tracking contains fields to record details of the Amended Final EHC Plan.

Section 2. Consultations contains fields to record any consultations undertaken whilst trying to find a setting.

Section 3. Additional Funding Approval contains all the relevant fields to record any requests for Additional Resources.

Section 4. Outcomes contains a mandatory field to select the **Initial Amended Final EHC Plan / Amended Final EHC Plan Outcome** (dependent on whether a setting has been named or not) and a mandatory tick box of **Decision recorded by**.

Once the Amendment Notice form has been completed, the worker must navigate to **Section 5. Next actions** and select the relevant next action from the Select action drop down menu.

Please note:

- Mosaic Admin Only (Med)
- Mosaic Admin Only (Tri)

SEND workers should NOT try to select the Next actions above as they should only be used by Mosaic Admin. If these routes (Mediation / Tribunal) are required then the worker should contact the Mosaic Support team with these requests.

If the EHC Plan is no longer required and the case is closing to the SEND team, a Mosaic **CS Please action** request should be sent to the SEND Business Support Annual Review worker. The SEND Business Support Annual Review worker will send out the Notification letter informing of intent to cease to maintain the EHC plan.

After 15 days and no response the Next action of **SEND EHC Case Closure** should be selected.

Once all the relevant fields have been completed and the next actions have been selected, the worker must click the  finish icon to **finish the step**.

SEND EHC Case Closure – completed by SEND Caseworker / SEND Practice Supervisor

Once generated as a next action, a **SEND EHC Case Closure** workstep will appear in the **Incoming work** folder within the **Current work** of the Caseworker.

Current work

Type ↓	Subject	Title	Status	Priority	Date
	Incoming work (3)				
	Chloe Cook (3549818)	<u>SEND EHC Case Closure</u>			18 May 2023

The workstep can be opened by clicking on the title **SEND EHC Case Closure** **hyperlink** and selecting **Start** from the menu that appears in the **Workstep summary screen**. The SEND EHC Case Closure step will also be available in the Current work box on the Person summary screen for the young person.

Before starting the closure, it is advised to check the appropriate **File Retention Date** has been added to the young person. You can do this by clicking on **File Management** on the left hand menu of the Person summary page and then **File Retention**.

Once the step has been started, the **SEND EHC Closure Record C0299** form will display.

SEND EHC Case Closure: Chloe Cook 3549818

SEND EHC Closure Record C0299

Sections

- 1. Service Closure Record
- 2. Manager's Authorisation
- 3. Next actions

1. Service Closure Record

Child / Young Person's details

Name	Gender	Date of Birth
Chloe Cook	Female	05/09/2017

Service Involvement

1. Reasons for request and summary of intervention to date

2. Have any open services / purchases arranged as part of this workflow been ended as required? * -- Please Select --

3. Reason for closure: * -- Please Select --

Section 1. Service Closure Record is completed by the Caseworker with mandatory fields to record the Reason for closure and check the File retention details.

Once Section 1 has been completed, the worker must send an **authorisation request** by clicking the requests icon which will be highlighted yellow.

Once clicked, the New request window will appear. The worker must use the **REQUIRED CS Manager: Please review and authorise** request to send the step to

the Manager. Once the request has been selected, the **Find worker** button will appear, allowing the worker to **search for their Manager**.

Select	Request type	Status (date)	Assigned to
<input checked="" type="radio"/>	Required CS Manager: Please review and authorise		
<input type="radio"/>	CS Notification of information to involved worker / team		
<input type="radio"/>	CS Please action		

Note

Pass to worker* **Find**

This request will be sent when you next save.

OK **Cancel**

Once the request has been selected and the Manager has been found, the worker must click **OK and save the workstep** by clicking the save icon. The request will not be sent to the Manager until the workstep is saved. The worker should then **Close** the workstep by clicking the close icon in the top right of the screen.

The Manager will receive this request in the **Incoming Requests** folder of their Workview and they will be able to resume the workstep and complete **Section 2. Manager's Authorisation**.

The last task the Manager must complete within the closure step is to navigate to **Section 3. Next actions** and select **SEND Case Closed (NFA)** from the Select action drop down menu, then click **Add and Close**.

Please note: If the worker is notified that Mediation or Tribunal is requested whilst the SEND EHC Case Closure workstep is still incomplete, then Next actions of **SEND Mediation Services** or **SEND Tribunal** should be selected along with **SEND Case Closed (NFA)**. Once progressed through the Mediation or Tribunal worksteps, another SEND EHC Case Closure can be completed.

Please note: If there were ongoing purchases for the young person, the Manager must also add CS SEND Purchase Request from the Select action drop down. This can then be assigned to either the Caseworker or Business Support.

Once all the relevant fields have been completed and the next actions have been selected, the worker must click the finish icon to **finish the step**.

SEND Mediation Services– completed by SEND Practice Supervisor

The SEND Mediation Services step will sit in the Incoming work of the worker it was assigned to. Once started, the **SEND Mediation Services C0408** form will display.

Section 1. SEND Mediation Service Details contains mandatory fields to complete when the case has gone to mediation including one to record the outcome of the mediation. If the decision to issue an EHC Plan has been overturned, **Section 2. SEND Agency Hub Decisions** becomes active to record into. Once the information has been entered, click on **Section 3. Next actions** to add the relevant next actions dependent on the outcome of the mediation. Once selections have been made, click **Add and Close** then click the  finish icon to finish the step.

SEND Tribunal– completed by SEND Practice Supervisor

The SEND Tribunal step will sit in the Incoming work of the worker it was assigned to. Once the step is started, the **SEND Tribunal C0426** form will display.

Section 1. Tribunal Information contains mandatory fields to complete when the case has gone to tribunal including one to record the outcome. If the decision to issue an EHC Plan has been overturned, **Section 2. SEND Agency Hub Decisions** becomes active to record into. Once the information has been entered, click on **Section 3. Next actions** to add the relevant next actions dependent on the outcome of the tribunal. Once selections have been made, click **Add and Close** then click the  finish icon to finish the step.