Children's Services Quick Guide

SEND Annual Review Letters

Sending the Clipboard Request from the SEND EHC Plan Review

When the Case Worker has completed an Annual Review, they should use the 🗒️ requests icon to send a request through to a designated Business Support Virtual Worker inbox to send the appropriate letter.

- Click onto the 🗒️ requests icon.
- From the **New request** window, select the appropriate request depending on the response to the Annual Review:
    - **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**
- Add a **Note** if you wish to add any further information.
- Use the **Pass to Worker** drop down to select the virtual worker, **CS SEND Annual Review – Business Support**.
- Click **OK**
- Once the step is saved, the request will be sent through to the Business Support virtual worker.
- The Case Worker will then need to close out of the workstep so that the Business Support can complete the request.
- The SEND EHC Plan Review step will be highlighted in **yellow** in the **Incomplete work** of the Case Worker.
- Once the clipboard request has been **completed**, the step will return to **white** with a tick next to the Incomplete symbol 📋 within the **Current work> Incomplete work** within the Full/Narrow workview.
- The Case Worker can resume the step and finish when no further inputting is needed.

Processing the Clipboard Request from the SEND EHC Plan Review

All workers within the **CS SEND Service Business Support Team** should be able to access the **CS SEND Annual Review – Business Support** inbox by clicking on the 📇 Team workview icon to view the Team summary.

- From the Team summary list, click on the **CS SEND Annual Review – Business Support** to view the inbox.
- The screen will refresh and any **Incoming requests** will appear.
- Click on the title of the request to view the Workstep summary and click on **Resume** on the top left of the summary page. The **SEND EHC Plan Review** will appear.
- Business Support will be able to review the content of the review and complete the letter asked for in the request.
- Business Support can **upload** a copy of the letter, if appropriate, using the view documents icon .
- Once the letter has been sent, Business Support can click onto the clipboard which will be highlighted in red.
- Click onto the red highlighted request with the CS SEND Annual Review – Business Support in brackets and mark is as **Completed**.
- Click **OK** and close out of the workstep.