

## Children's Services Quick Guide

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### Recording Educational Psychology involvement

Recording Educational Psychology involvement will be done by Business Support once they receive a referral from the SEND team or a school for a child/young person who is on a SEND plan. The first step in the process is adding the Contact to the child's record.

#### Adding the CS Children's Services Contact

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From the **Person summary** of the individual, click on **Start** and select **CS Children's Services Contact**. The form **CS Children's Services Contact C0925** will open, with the following Sections:

1. **Family / Household details** – the young person's details pull through from the Person Summary. There is an option to add **Family / household members** clicking on the  Find button, as well as adding details of their communication needs.
2. **Contact / Referral Details** – there are a number of mandatory questions and text fields that need completing:
  - **Date / time of contact** can be amended if necessary, using the  date and time picker icon.
  - **Type, Method** and **Source of Contact** will offer a selection of choices from drop down menus, select as appropriate.
  - **Person Making Contact** – click on Find to search for the name of the **SEND Caseworker**
  - **The referrer is** – select the relevant option
  - **Reasons for contact** – enter details as appropriate
  - It is mandatory to answer the question regarding any **hazards or risks** to professionals in the home
  - Further mandatory questions relate to various consents – select as appropriate
3. **Occupational Therapy Service Request Only** – ignore
4. **Outcomes and Next Actions** – any recommendations can be recorded here

5. **Next actions** – click on Add and select **CS Education Psychology Request**, assigning it to the **CS Educational Psychology – Business Support**.

When all appropriate information has been entered in the sections and all mandatory fields completed, the  finish button can be used to seal the step and open the CS Education Psychology Request.

The CS Education Psychology Request will sit with the Virtual Worker in the Team Inbox and Business Support will access it to complete the rest of the steps.

## **Completing the CS Education Psychology Request**

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From the Narrow or Full workview, click on the  Team workview icon to access the Business Support Team Inbox. Click onto the **CS Educational Psychology – Business Request** and the screen will refresh to display the **Current work** with the Virtual Worker.

Start the CS Education Psychology Request for the appropriate individual. A box will appear asking if you want to start the work that isn't assigned to you, click **Yes**. The **EP Educational Psychology Request C0183** form will load.

1. **Child / Family Details** - the young person's details pull through from the Person summary. There is an option to add Family / household members clicking on the  Find button, as well as adding details of their communication needs. There are different options to select the **Description of Need (Code of Practice 2014)**.
2. **Request Details** – information will map from the previous step, and an additional text field is available to record the **Summary of Present Concerns**.
3. **Education Details** – select the relevant **Category of Setting attended**. The Education Establishment details should be already added to the young person's record by the SEND caseworker and that will prepopulate the field. Select the **Setting Type** from the drop down and add the **Date child started** from the calendar (if known).

**3. Education Details**

**Category of Setting attended**

Early Years Setting
  School / Educational Establishment
  None

Details of the setting the child is attending

Education Establishment

Setting Type

Date child started

Further details can be recorded in the rest of the section if relevant.

4. **Request Outcome** – select the appropriate option. In the **Comments**, you can record the Type of Assessment from the tracker used outside Mosaic. Tick the Signed box and add the date from the calendar.
5. **Next actions** – click on Add and select **CS Education Psychology Casework** and assign it to yourself or the **CS Educational Psychology – Business Support**, then Finish the step with the  finish icon.

## Completing the CS Education Psychology Casework

Once the report comes back and is checked by the SEND caseworker, start the Casework step from your Current work or through the Virtual Worker in the Team Inbox. The form **EP Contact Involvements Record C0189** will load.

1. **Contact / Involvement Record** – add the **Date of Allocations Meeting** and the name of the professional allocated. There are separate tables you can use to add the different specialists.

Date of Allocations Meeting  

**Allocation to Educational Psychologist**

Date Allocated	Name	Telephone Number

 Find

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**Allocation to SST (Specialist Teacher)**

Date Allocated	Name	Telephone Number

 Find

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**Allocation to Early Years Specialist**

Date Allocated	Name	Telephone Number

 Find

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**Allocation to SEST Teacher**

Date Allocated	Name	Telephone Number

 Find

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**Allocation to Health Practitioner**

Click on the  Find button for the relevant table to search for the professional. Once found, you will be prompted to add the **Date Allocated to ....** Click **Add and Close**.

Select the relevant **Activity Code** from the drop down, which may expand the section and show mandatory fields to record the **Assessment Type**, the **Triage Summary**, the **Actual PCP Date** and whether the **EP did attend the PCP Meeting**.

- 1

Activity Code  

Assessment type  **-- Please Select --**

Triage summary  **-- Please Select --**

- A1 - Early Years (1 day)
- A2 - SEMH
- B - Joint Assessment
- C - Health
- D - Known to Service Specialist Teacher

Expected PCP Date

Actual PCP Date  

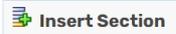
 Please enter date

**Did the EP attend the PCP Meeting?**

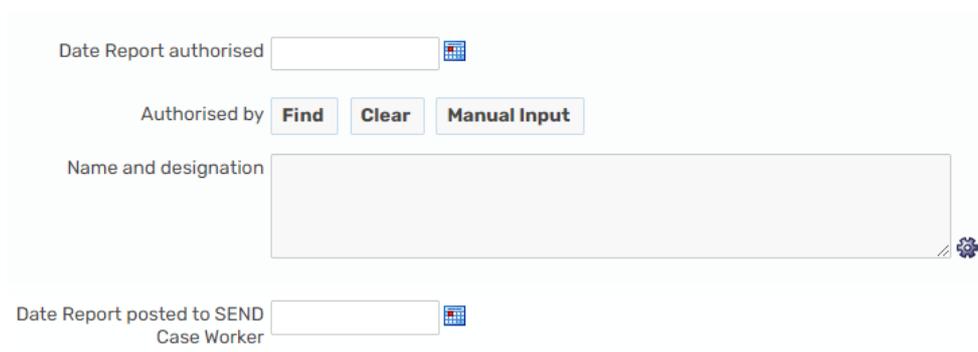
Yes  No

Depending on the selection of allocated professional, there is a number of corresponding date fields to record when the report was received.

Further details can be added if the selected professional has provided desktop advice and information. The entire section can be duplicated, if necessary, by clicking on the Insert

Section button  .

Details of the authorisation will be added at the bottom of Section 1, together with the date the report was sent to the SEND worker.



The form contains the following fields and controls:

- Date Report authorised:  
- Authorised by:
- Name and designation:
- Date Report posted to SEND Case Worker:  

A copy of the report or other relevant documents can be attached to the workstep by clicking on the  View documents icon.

2. **Next actions** – select **CS Education Psychology Case Closure**, assign it to yourself or the **CS Educational Psychology – Business Support**, and finish the step.

## Completing the CS Education Psychology Case Closure

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The **CS Education Psychology Case Closure** is the last step in the workflow and will sit in your Incoming work folder in Current work or the Virtual Worker's Current work. Before starting the step, please check that a relevant **File Retention Criteria** was added to the child's Person summary.

Once started the form **EP Educational Psychology Closure Record C0193** will load.

1. **Service Closure Record** – the young person's details will pull through together with Service Involvement information recorded in the initial Contact form. All fields in Section 1 are optional to record reasons and details about why the case is being closed as well as adding a summary of interventions and any outstanding issues. Complete all fields as appropriate and tick the **Closure completed by** tick box.

2. **Closure Authorisation** – in most service areas this is a section for line managers and supervisors, however the Educational Psychology involvement is recorded solely by Business Support including the closure checklist and e-signature.
3. **Next actions** – click on Add and select **CS Education Psychology Case Closed (NFA)**.