

## Children's Services Quick Guide

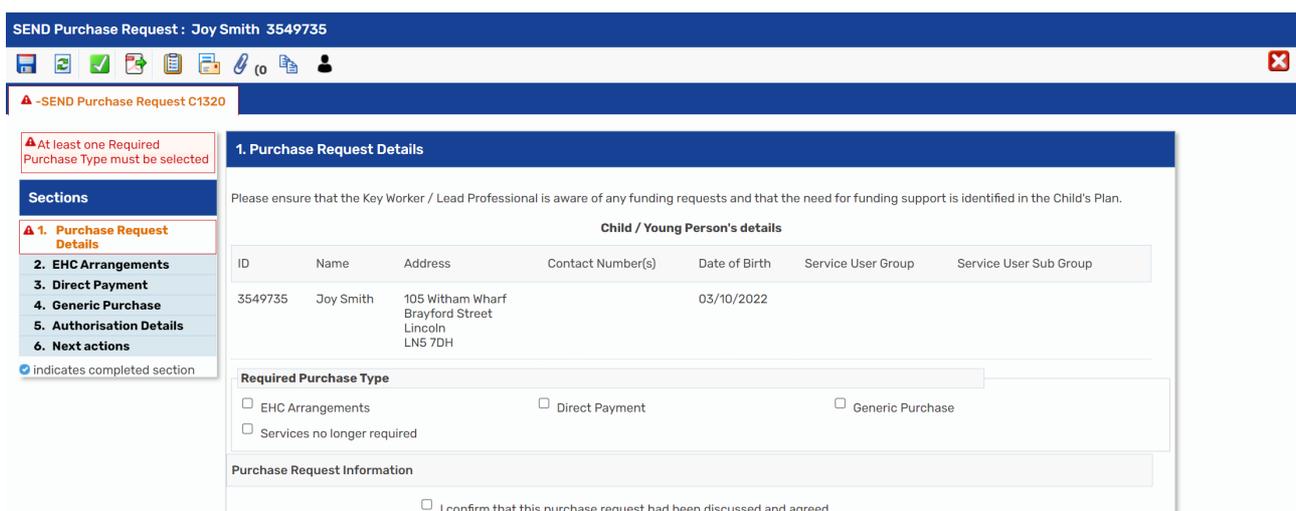
# Completing the SEND Purchase Request

The **SEND Purchase Request** is available from most SEND worksteps and can be sent immediately for instant access. This guide will outline the completion for **EHC Arrangements**.

Start the workstep from your Incoming work or the Current work section within the Person summary– **SEND Purchase Request C1320** will load.

## Section 1. Purchase Request Details

Select the **Required Purchase Type**. You will need to complete the relevant section of the form that becomes active with your selection.



SEND Purchase Request : Joy Smith 3549735

-SEND Purchase Request C1320

At least one Required Purchase Type must be selected

**Sections**

- 1. Purchase Request Details
- 2. EHC Arrangements
- 3. Direct Payment
- 4. Generic Purchase
- 5. Authorisation Details
- 6. Next actions

indicates completed section

**1. Purchase Request Details**

Please ensure that the Key Worker / Lead Professional is aware of any funding requests and that the need for funding support is identified in the Child's Plan.

**Child / Young Person's details**

ID	Name	Address	Contact Number(s)	Date of Birth	Service User Group	Service User Sub Group
3549735	Joy Smith	105 Witham Wharf Brayford Street Lincoln LN5 7DH		03/10/2022		

**Required Purchase Type**

EHC Arrangements
  Direct Payment
  Generic Purchase
  Services no longer required

**Purchase Request Information**

I confirm that this purchase request had been discussed and agreed

- **Purchase Request Information** – tick the box to confirm that the purchase request has been discussed and agreed.
- **Worker Making Request** – enter the **Date of Request** and tick the **Completed by**.

## Section 2. EHC Arrangements

Select the appropriate **Request Type**, this will expand the screen to enable you to enter all relevant details. Multiple types can be selected if necessary.

## 2. EHC Arrangements

### Request Type

- |   |  |   |
|---|--|---|
| <input type="checkbox"/> Special School Funding | <input type="checkbox"/> Pre-16 Mainstream Top-Up Funding          | <input type="checkbox"/> Post-16 6th Form Funding   |
| <input type="checkbox"/> Medical Funding        | <input type="checkbox"/> Independent Non-Maintained School Funding | <input type="checkbox"/> Independent Non-Maintained Special School Funding                      |
| <input type="checkbox"/> Personal Budget        | <input type="checkbox"/> Post-16 FE College Funding                | <input type="checkbox"/> Other Local Authority School (not Independent/resides in Lincolnshire) |
| <input type="checkbox"/> Early Years Funding    |  |   |

- If **Special School Funding** is selected, specific mandatory fields will need completing, including **Find Setting** and **Banding Details**. Select the **Start/ End date of new Banding** from the calendar, the appropriate **New Band (to change to)** and tick the box under **Exceptional Funding** to record if it has been agreed. This will open further mandatory fields where the **Start/End date of the Exceptional Funding** and the **Agreed Amount** can be added.

Special Schools Funding Details

Find Setting **Find Setting** **Clear** ?

Organisation ID  ?

**⚠ Please 'Find Setting'**

Organisation Name and Address  ?

---

**Banding Details**

Start Date of New Banding  ?

**⚠ Please enter Start Date**

End Date of New Banding  ?

**⚠ Please enter New Banding End Date**

Current Band (to change from) -- Please Select -- ?

New Band (to change to) -- Please Select --

**⚠ Please select Band**

**EXCEPTIONAL FUNDING:**

Exceptional funding agreed

**Please Note:** Selecting the **Early years Funding, Pre-16 Mainstream Top-Up Funding, Post-16 6<sup>th</sup> Form Funding** and **Other Local Authority School** (not independent/resides in Lincolnshire) will require details similar to the Special School Funding.

- If **Medical Funding** is selected, specify the **Medical Funding Requirements**, which will expand the section further to enable you to record all relevant details. Click on **Find Setting** to add the setting, and fill in the mandatory **Start/End date**. The **Level of Funding** selected will calculate the **Standard hours**, giving you the option to manually enter the **Actual hours (if different)**.

Level of Funding

Details

Start date

End date

Level of funding -- Please Select --

Standard hours

Actual hours (if different)

**Please enter Start date**

**Please enter End date**

**Please select Level of funding**

Any additional information can be recorded in the **Further Details** field.

- If **Personal Budget** is selected, you will be prompted to complete the **Section 3. Direct Payment**. In order to activate the section, you will have to navigate back to Section 1. Purchase Request Details and select **Direct Payment** as a **Required Purchase Type**.
- If **Independent Non-Maintained School Funding** or **Independent Non-Maintained Special School Funding** is selected, complete the mandatory details and tick **Joint Funding Agreed**, this will enable you click on the **Find** button to enter all relevant details in the table as shown below.

Joint Funding Agreed

Joint Funding Source details

Name	Start Date	End Date	Share (%)	Cost Centre
<b>Please complete the table</b>				

Net Cost - (Pro Rata Cost less 3rd party contributions)

Further Details

- If **Other Local Authority Repayment (Recoupment)** is selected, you will need to add the Setting Details, Start and End Date and the Annual Cost.

Once all mandatory fields are completed, tick **Completed by** to sign the form.

**Section 3 and 4** will not be active if the initially selected Purchase Type was **EHC Arrangements** only.

**Please Note:** Most Purchase Requests within LCC have to be authorised at the time of recording. However all SEND purchases have been authorised prior to it being added to the system, therefore there is no required clipboard request that need to be sent.

### **Section 5. Authorisation Details**

You will need to select if the child is in care or not and a box is available to record Further Details.

### **Section 6. Next actions**

For EHC Arrangements, use the **Add** to select **SEND Purchase Admin**. The **Pass to worker** drop down appears to select **CS SEND Finance – Business Support**.

Once all relevant information is recorded, the step can be finished with the  finish icon.