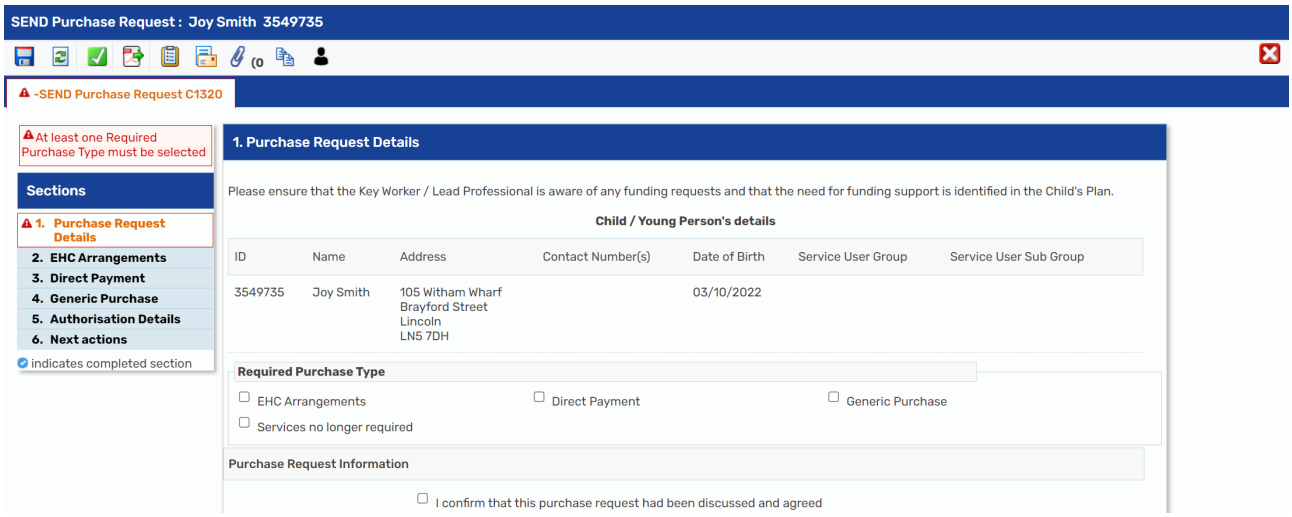
Completing the SEND Purchase Request

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

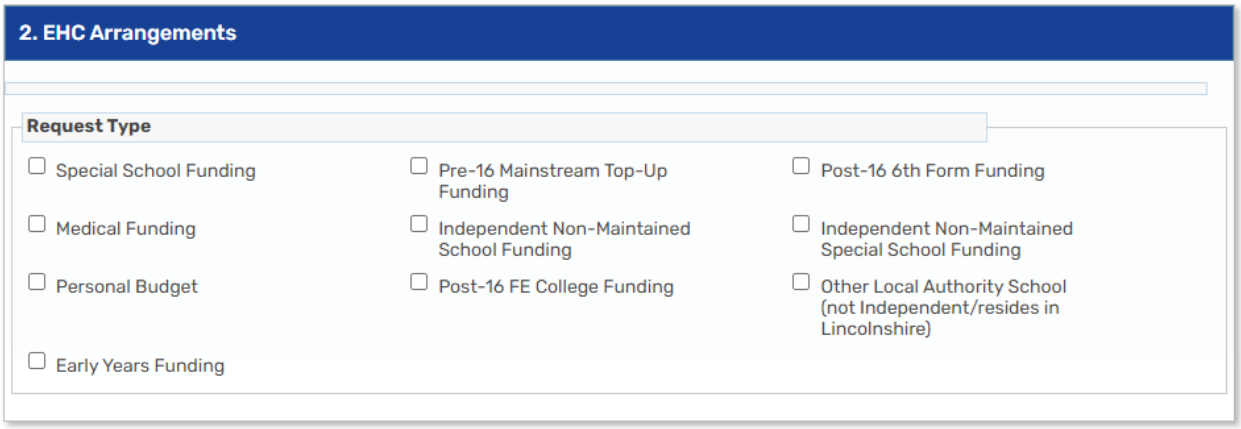
Select the **Required Purchase Type**. You will need to complete the relevant section of the form that becomes active with your selection.



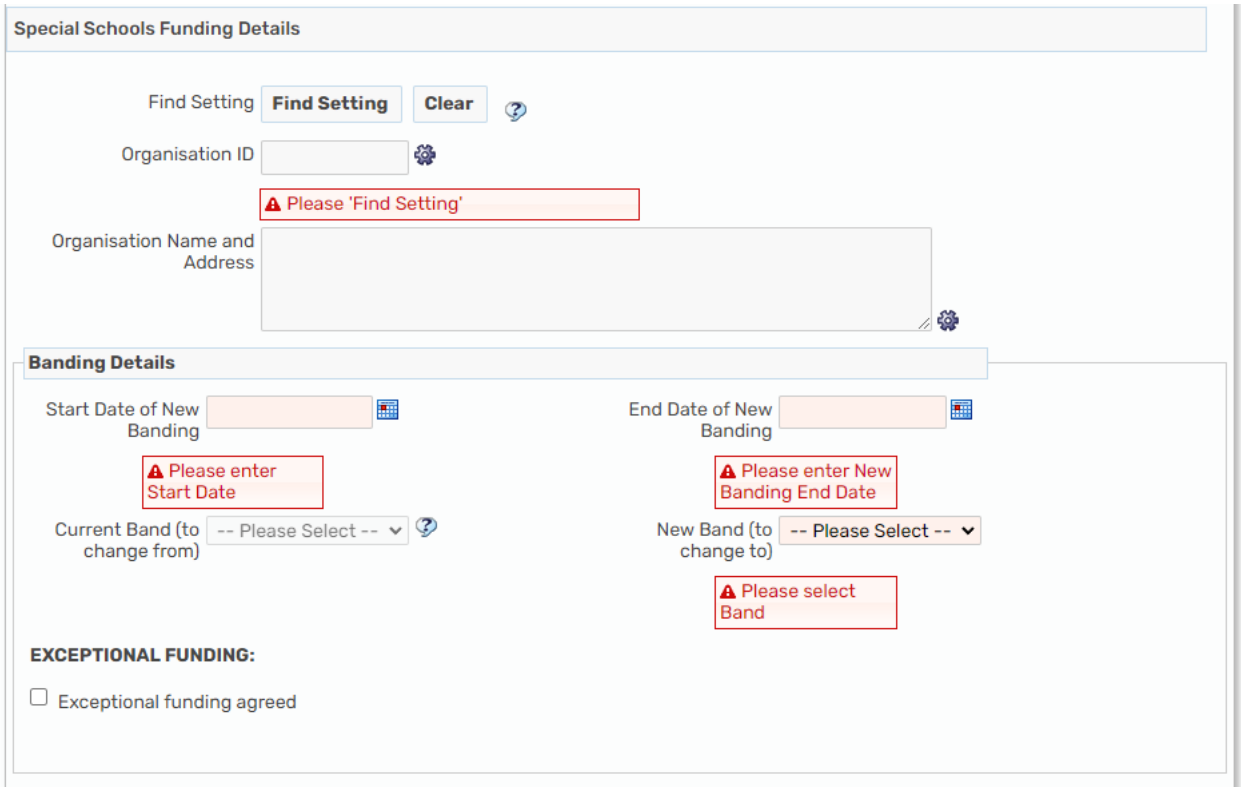
- **Purchase Request Information** – tick the box to confirm that the purchase request has been discussed and agreed.
- **Worker Making Request** – enter the **Date of Request** and tick the **Completed by**.

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.

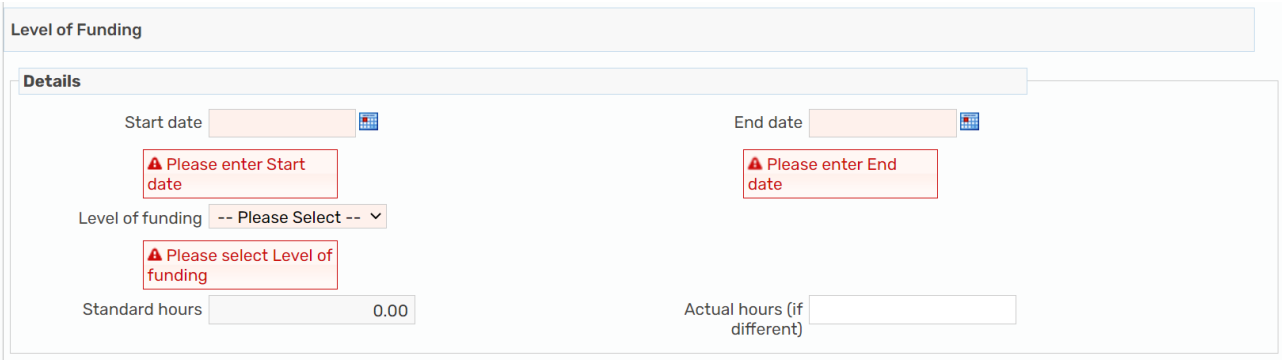


- If **Special School Funding** is selected**,** specific mandatory fields will need completing, including **Find Setting** and **Banding Details**. Select the **Start/ End date of new Banding** from the calendar, the appropriate **New Band (to change to)** and tick the box under **Exceptional Funding** 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.



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

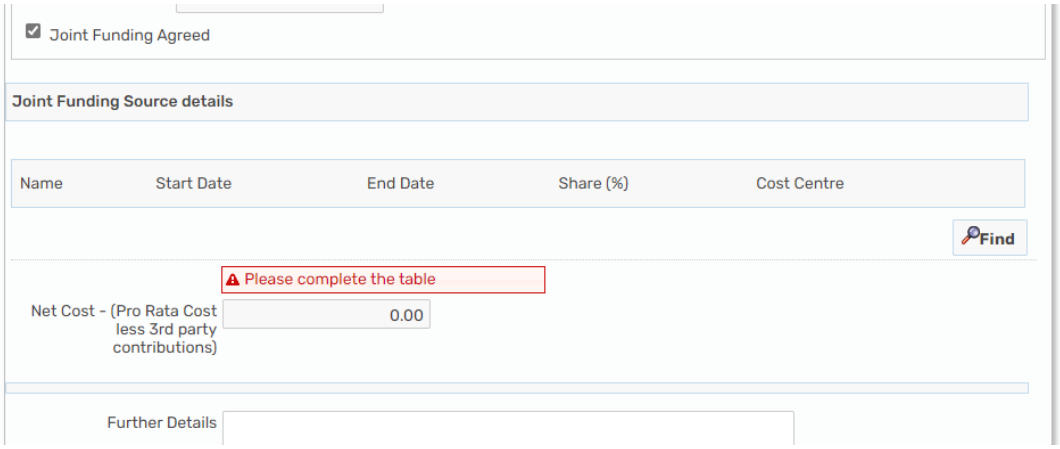
- If **Medical Funding** is selected, specify the **Medical Funding Requirements**, which will expand the section further to enable you to record all relevant details. Click on **Find Setting** to add the setting, and fill in the mandatory **Start/End date**. The **Level of Funding** selected will calculate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



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.



- 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.