SEND Business Support Hints and Tips

This guide is designed to help SEND Business Support complete the tasks required around the Annual Review process for SEND.

Using the Team Workview

All members of SEND Business Support have access to the Team workview. This allows them to access all the Virtual workers for the team as well as colleagues' Current work.

To access the Team workview, from the Narrow or Full workview, click on the Team workview icon 👥.

A CS SEND Team locality can be selected to locate a Caseworker's Current work.

Business Support can either use the Team workview to find the SEND Plan and Review step for a person or use the Find Person to do a person search for a record and find the step from there.

To Start or Resume the workstep, click on the symbol to the left and click **Start work** or **Resume work**.

The step will open in a new window to add information to.

Attaching Documents

Documents received can be uploaded to the workstep using the View documents icon 📎.

Before uploading any documents, please double check the document you plan to upload is the correct one for the person's record. If the wrong document has been uploaded, it can be removed whilst the step is still open as outlined in the next section.

If this is the first document to be uploaded, clicking on the icon displays **Attach a document**.

An **Attach document** box displays. Click on **Chose File** under Document file to search for and select the document to be attached.

Under **Filing details**, **File as** will prepopulate with the name of the saved document. This should be amended to the naming convention used by your team.

Main Category will always be **CS SEND EHC Process**. Select the appropriate **Sub-category** such as **Assessments, Plans, Reviews**. Click **Add** to upload the document.

A message will pop up as a reminder that the upload will complete when saved/finished. Click **OK** to remove the pop up.

Next to the View documents icon, in the brackets a number 1 will now appear.
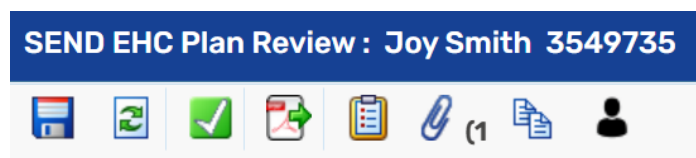

Once a document has been attached, a further document can be uploaded by clicking on the View documents icon and then **Attach a document** again. Existing uploading documents will display as a list below.

Amending or deleting uploaded documents

Whilst a step is saved and not finished, any uploaded documents can be renamed or deleted. To do this, click onto the View documents icon and click on the name of the document you want to amend/delete.
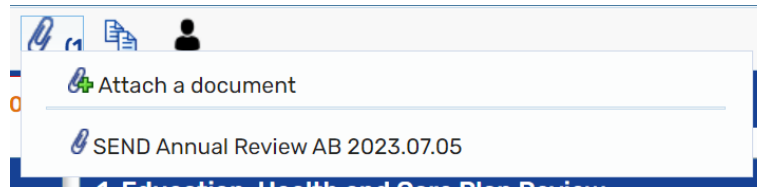
The **Document details** window displays. Click on the hyperlink next to the **Save as** to view the document to ensure it is the correct version.
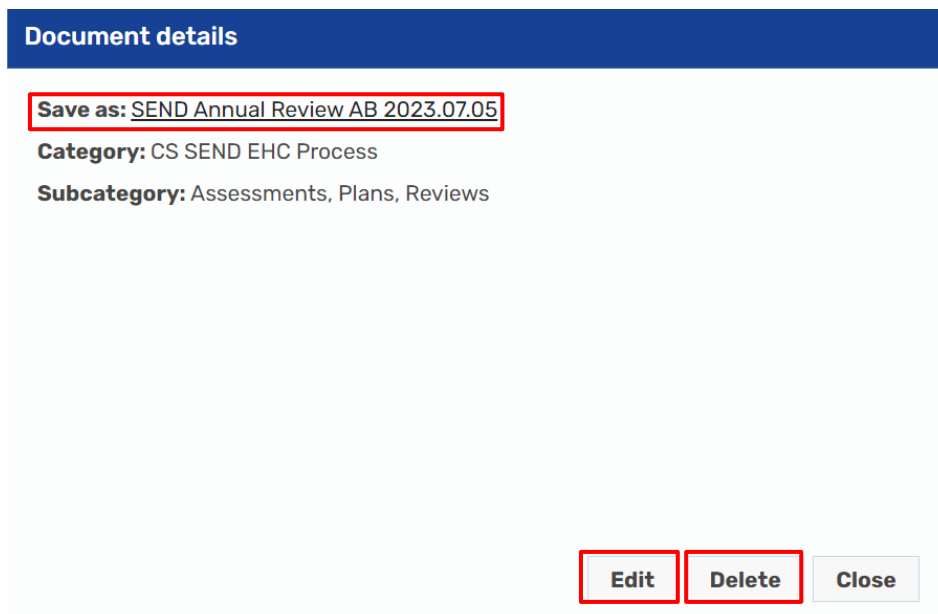
Click on **Edit** to rename the document or change the Category and/or Sub-category. Click **Save changes** to confirm the amendments or cancel to come out without changing anything.

From the Document details, you can delete the document from the workstep by clicking on **Delete**. A Confirm box will pop up making sure you wish to delete the document, click **OK** to confirm or **Cancel** to come out without deleting.

Sending the Clipboard Requests

Within a workstep, clipboard requests or notifications can be used as an 'invitation' to another worker into the step to complete a task.

Many of the options in the SEND EHC Plan Review step are descriptive and will be used in different scenarios. The requests can be viewed by clicking on the Requests icon 📋.

Using the **Select** button to the left of the request will open up a **Pass to worker** field. Some requests or notifications can only be sent to a named worker or virtual worker which will display as a drop down, others can be sent to any worker and will have a **Find** button to search for the worker's name.

New request

Select	Request type		Status (date)	Assigned to
○	CS Annual Review Letter of intent sent		🛈	
○	CS Annual Review next steps to be taken		🛈	
○	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		📋	
○	CS EHC process ongoing, Assistant Caseworker to action		🛈	
○	CS Manager: Please review and authorise		📋	
○	CS Please action		📋	
○	CS Review date advised, Case Worker attendance not requested		🛈	
○	CS Review date advised, Case Worker attendance requested		📋	
○	CS Review documentation received. Please record and advise next steps		📋	
○	CS Transition Planning Notification to Adult Care		🛈	

Note [   ]

Pass to worker* [-- Please select -- ▾]

ⓘ This request will be sent when you next save.

[OK] [Cancel]

There are two types of requests. A Request requires a response before a step can be finished and has a yellow clipboard icon 📋. These are normally tasks for another worker to complete. A Notification is used for information purposes only so a step can be finished

without the notification being processed or acknowledged. Notifications are displayed with the purple clipboard icon ◘.

Once a request has been selected, and the worker or virtual worker found, the **Note** field can be used to enter any instructions or information for the recipient of the request. Click **OK** and then save the workstep to send the request. The request will not be sent until the step has been saved and the recipient can not enter the workstep until the step is closed.

The step will display in your Current work under Incomplete work highlighted in yellow with a 📤 sent request icon to the left to show the task is outstanding. Once the recipient has marked the request as **Completed**, it will have a green tick and show the 📗 completed request icon.

📇	👤 Joy Smith (3549735)	SEND EHC Plan Review		📄	9 Mar 2023

If the recipient has sent a further request, the step will remain in yellow with an egg timer icon 📇 to show there are completed and outstanding tasks.

Receiving the Clipboard Requests

Any requests received by Business Support will display under Incoming requests in a Virtual worker's or individual worker's Current work.

CS SEND Service Business Support Team ⟩ CS SEND Annual Review - Business Support ⌄						
⌃ **Allocations**						Bulk Assign ↻
⌄ **Current work**						Bulk Assign ↻
Type ↑	**Subject**	**Title**	**Status**	**Priority**	**Date**	**Note**
📁	Incoming requests (1)					
📇	👤 Joy Smith (3549735)	CS Business Support: Please send no change letter:SEND EHC Plan Review		📄	5 Jul 2023	

The step can be resumed by clicking on the symbol to the left and selecting **Resume work**. Alternatively, you can click on the **Title** to enter the Workstep summary and click **Resume** on the top left menu.

Once in the step, any information can be added to the form as required and documents can be uploaded.

To complete the request, click onto the request icon 📋 which will be highlighted in red. Select the red highlighted request with your name or the Virtual worker's name in the brackets. The **Sent request** window will display.

The request can either be **Completed** or **Returned**. If the request has been actioned fully, select **Completed** as this will allow the step to continue or be finished. If further information is required or the action could not be completed, the request can be **Returned** with a **Note** added. A returned request will mean the step will display highlighted in **Red** in the Current work. A step must eventually be marked as **Completed** in order for the step to be finished. If the request is no longer required, the sender is able to mark the request as **Withdrawn** so no response will be needed.

Further guidance on Requests and Notifications can be found here Viewing and working with requests and notifications (lincolnshire.gov.uk)

Adding next actions

When the SEND EHC Plan Review step has been completed with all information added and documents uploaded, **Next actions** should be selected in Section 2.

If Business Support are adding the actions, only one next action should be added depending on the outcome of the review (if it took place). A Caseworker may add an additional action of SEND Purchase Request for example if required.

Click on **Add** and select the required next action such as:
- SEND EHC Plan Review (no amendments required)
- SEND EHC Plan Amendment Notice / OLA Transfer
- SEND EHC Needs Assessment

The Pass to worker can be used to assign to the Caseworker, Assistant Caseworker or Virtual worker. Click on **Add and close** to add the action to the table.

If two or more steps have been added to the next actions in error, the delete icon 🗑 can be used to remove the unrequired steps. The edit icon 🖍 can be used to amend who the next action is to be assigned to.

To access the next action, the current SEND EHC Plan Review must be finished using the finish icon ✅ to lock down this version and open the next actions.