
Initiating the Special Guardianship Order Workflow

When a person or people are applying to become SGO carers, the Fostering Team will need to initiate this workflow. If there is a couple applying, the workflow must be initiated on a Group. This guide will outline the process for initiating the workflow on an individual and group applicants.

Initiating the workflow on an individual applicant

- Access the applicant's Person summary
- From the left-hand side menu, select **Start**
- From the Start menu, select **CS Childrens Carer Contact**
- Complete Sections 1-3 with the details of the request. In Section 2, the **Type of contact** should be **Carer Intention to apply for SGO**
- Section 4. Next actions, select:
 - **CS Case Supervision for SGO Only**
 - **SC Undertake Medical Checks for Special Guardian**
 - **SC Prospective Special Guardian Visit**
 - **SC Undertake Checks/References for Special Guardian**
- The Case Supervision and Visit will be assigned to the allocated Supervising Social Worker
- The Statutory Checks and References and Medical Checks will be assigned to **CS Fostering Lincoln, Louth or Sleaford – Business Support**
- Finish the step to send the next actions to the worker to begin recording

Initiating the workflow on a couple of applicants

- Access one of the applicant's Person summary
- Check to make sure the relationship between the couple has been created under **Personal relationships** – you or the child's Social Worker may need to add the relationship if this doesn't exist already
- Check if a **Carer Group** already exists – this will display towards the bottom on the right-hand side of the Person summary page.

Please note: if a group does exist, there are alternative ways you can start the workflow through the group. For simplicity, the guide will show one method that can be used regardless of if a group already exists.

- From the left-hand side menu, select **Start**
- From the Start menu, select **CS Childrens Carer Contact**
- In Section 1, under **Subject's Details**, applicant 1's name will display.
- Use the **Find** to search for applicant 2, select the applicant from the results.
- If a group already exists containing both the applicants, a pop up will appear where you can see the **Possible groups**. Select a Carer group that contains both applicants if one is available. If not suitable, click on **Create**.
- If no group exists, a **Create** window will pop up allowing you to create a group. **Title** should be the word 'Carers' followed by the surname(s) e.g. Carers Smith. **Type** should be **Carers** and click **OK**.
- Complete Sections 1-3 with the details of the request. In Section 2, the **Type of contact** should be **Carer Intention to apply for SGO**
- Section 4. Next actions, select:
 - **CS Case Supervision for SGO Only**
 - **SC Prospective Special Guardian Visit**For the Visit and Case Supervision, use **Select all** to group the steps
 - **SC Undertake Checks/References for Special Guardian**
 - **SC Undertake Medical Checks for Special Guardian**For the medicals and checks/references, when you use **Select all** a pop up will appear, letting you know the steps will need to be added individually. Select **OK** to agree to this.
- The Case Supervision and Visit will be assigned to the allocated Supervising Social Worker
- The Statutory Checks and References and Medical Checks will be assigned to **CS Fostering Lincoln, Louth or Sleaford – Business Support**
- Finish the step to send the next actions to the worker to begin recording

Completing the worksteps

- **SC Prospective Special Guardian Visit**

The Prospective Special Guardian Visit will be used to record all visits. The step can be used to record multiple visits.

In Section 2, Insert Section can be used to record a subsequent visit. It is suggested a maximum of 12 visits should be recorded per step.

In Section 3, Next actions, the next action can be to add a further **Prospective Special Guardian Visit** to record further visits.

Once the SGO has been granted and no further visits need to be recorded, the next action of **SC End Workflow on Prospective Guardian** can be added. This is a 'no further action' and will end the workflow.

- **CS Case Supervision**

The Case Supervision step is used to record the supervisions between the Supervising Social Worker and Practice Supervisor.

Section 2. Next actions can be used to add a further supervision so it is available ahead of a subsequent supervision. Alternatively, **CS Service Ended – No Further Supervision Required (NFA)** can be added when the case is to close.

- **SC Statutory Checks and References**

The Statutory Checks and References will always be an individual step. It is used to record all the checks and references which have been requested and received.

Section 3. Next actions can be used to schedule further checks with **CS Checks Completed – Scheduled Next Statutory Checks**. The Scheduled Date should be amended to reflect when the next checks are due by.

Alternatively, **CS Checks Completed (NFA)** can be added when the case is to close.

- **SC Carer Medical Checks**

The Carer Medical Checks will always be an individual step. It is used to record when medical checks which have been requested and the results received.

Section 2. Next actions can be used to schedule further checks with **CS Schedule Renewal Medical Checks**. The Scheduled Date should be amended to reflect when the next medical is due by.

Alternatively, **CS Medical Checks Completed (NFA)** can be added when the case is to close.

Please note: If the Case Supervision, Carer Medical Checks or Statutory Checks and Reference steps remain after the Visit step has had the next action of no further action added, the Practice Supervisor is able to cancel any steps that are Incoming or Future. Incomplete steps will either need to be completed if the information inputted is required or deleted by the helpdesk.