# Purchasing Worksteps – Early Help

Recording a purchase for Early Help in Mosaic is completed over three worksteps, Purchase Request, Purchase Admin and Purchase. This guide outlines how to complete these steps starting with the EH Early Help Purchase Request.

Service User Groups

Before starting the Early Help Purchase Request, there must first be a **Service user group** added to the clients record. If one has already been added, it will show on the Person summary screen on the right hand side.
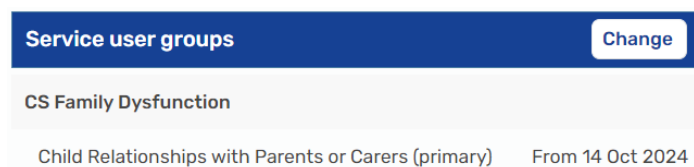
To add a **Service user group**:
- Click on **Person details**
- Select **Service user groups** from the menu
- Check and amend the **Start Date**
- Select a **Group**
- Select a **Sub-Group**
- Click on **Add** on the middle right of the screen
- The selection will pull through to the Service user groups table
- Click on **Save** to confirm the choice

Once a Service user group is added, it will pull through to the Early Help Purchase Request.

Early Help Purchase Request

The Early Help Purchase Request is a **Send Immediately** next action from EH TAC Plan and Review, EH Early Help Visit, EH ESCO Casework and EH Youth Homeless Intervention. Send Immediately can be used to access the next action when the step has been saved rather than finished. This step should be completed by the worker who is requesting the purchase and authorised by the manager whose budget the money will come from.

After the Early Help Purchase Request has been added to the workflow, it can be started from Incoming work.

Within the EH Early Help Purchase Request, the form **CS Purchase Request C0777** will display.

Section 1. Purchase Request Details
The Child / Young Person's Details section should be checked to ensure the child's details are correct and a Service user group has been added.

The **Required Purchase Type** should be completed next. This will reveal further fields within Section 1 for:
- Generic Purchase
- Child Placement Costs
- Legal / Adoption Support Costs
- OT Equipment Purchase Request
- Carer Expenses
- In-House Residential Placement
- Care Leaver Costs
- Supported Childcare Request

If Direct Payment is selected, you should complete Section 2. Direct Payment.

If Transport Request is selected, use the optional forms icon open and complete CS Childrens Transport Purchase Request C0400.

The step should only be completed for one purchase type at a time. The most commonly used would be for **Generic Purchase** and **Transport Request** for Early Help.

All mandatory fields will need to be completed within the form.

Below is a table outlining the Next action that should be added depending on the Required Purchase Type.

Required Purchase Type	What Next action to add	Who the Next action should be assigned to
• **Generic Purchase** • **Child Placement Costs** • **Legal / Adoption Support Costs** • **OT Equipment Purchase Request** • **Carer Expenses** • **In-House Residential Placement** • **Care Leaver Costs** • **Supported Childcare Request** • **Direct Payments**	EH Early Help Purchase Admin	Appropriate locality Business Support CS EH Team (Boston/S Holland) – Business Support CS EH Team (East Lindsey) – Business Support CS EH Team (Lincoln/W Lindsey) – Business Support CS EH Team (Nth/Sth Kesteven) – Business Support
Transport Request	SC Request Transport from Transport Team	LCC Passenger Transport - Inbox

A Next action of **CS No Further Action** can be selected with **Reasons** of CS Request abandoned or CS Request not approved if the Purchase Request is no longer required or authorised.

After Section 1, the corresponding Section or form and correct Next action has been completed, the worker must seek authorisation for the payment via the clipboard request.

- Click on the Requests icon 📋
- Select **Required CS Please review purchase request and authorise**
- Find the manager for whose budget is going to be used within **Pass to worker**
- Click **OK**

The workstep can be saved and exited so the authorising manager can review and complete Section 3. Authorisation.

The workstep will remain in the worker's Incomplete work, highlighted in yellow, until the manager has authorised and finished the step. When finished, the step will be removed

from Incomplete work and replaced with the step added as the Next action in a virtual worker's Incoming work.

Early Help Purchase Admin

Starting the EH Early Help Purchase Admin will open the form **CS Purchase Admin C1180**.

Information from the Early Help Purchase Request will prepopulate for the worker to review and fulfil the purchase outside of Mosaic.

Any invoices or documentation can be uploaded to the workstep using the view documents icon 📎 .

Business Support will need to complete **Section 3. Purchase Administration** answering **Have there been any amendments made to the requested purchase?**. If the final amount of the purchase is greater than the amount previously authorised in the Early Help Purchase Request, the worker can record the change in Section 3 and use the clipboard request icon 📋 to get the new amount authorised. The Note field within the clipboard request can also be used to record the change in amount. The authoriser can complete Section 4.

In **Section 5. Next actions**, the following action should be added depending on the purchase type:

Next action	When it is used	Who it is assigned to
EH Early Help Purchase	For purchases where a carer/adopter is paid	Use Find to assign to someone with the Accounts Payable Team or Assign to Me
CS Payment Actioned (NFA)	By Business Support once the payment has been actioned within Business World	N/A
CS No Further Action	By Business Support if the payment is no longer needed. A Reason needs selecting from: CS Existing services ended CS Service correction only CS Services updated / amended	N/A

Once completed, the step can be finished. If a no further action (NFA) was added, no more steps will be added. If the EH Early Help Purchase step was selected, this will be available in the assigned worker's Incoming work.