Purchasing Process for Special Schools

Step 1 - Service User Group

Current Work

SEND Purchase ( ) Summary

Service User Groups

CS Child Illness or Disability : Child with Learning Disability
View details (including history)

On the customer's record:

Ensure that an active service user group has been recorded with a relevant subgroup, if not then follow the below process.

Person Details	>	Basic Details
		Addresses
Start	>	Telephone Numbers
Case Notes		e-mail Address
Chronologies		Preferred Communication

Legal Status	Worker Relationships
Offences	Employment Status
	References
Registrations	Service User Groups

Click 'Person Details' then click 'Service User Groups'.

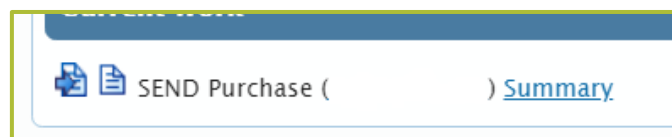Start Date * 03/07/2018

Group *

Sub-Group

Add the details of the most relevant service user group for that customer and click Add and then Save.

Note: more than one service user group can be active at any time however only one can be primary.

Add

Save

Step 2 - Purchasing

SEND Purchase (   ) Summary

On the person summary screen, click Start on the new workflow.

| CS Purchase Admin Notes C0917 | CS – SEND Purchasing |

The new workflow will open.
Of the two tabs available at the top of the screen, select "CS – Send Purchasing".
Here you will be able to view; end or amend existing services.

Unless you are adding the first service to customer's record, amend the existing provision rather than add a new one.
This is because it is quicker, provided that most of the details remain the same as the existing service.

The process for adding a new service is below, the process for ending or amending is linked here.

Ending/ Amending

Adding a new service

Add Provision

If you wish to add a new service then click Add Provision.

Service Group (select first)   ED - Special Educational Needs and Disabilities

Select 'ED – Special Educational Needs and Disabilities' from Service Group.

Service   Special Schools Banding

Select relevant value from Service – e.g. 'Special Schools Banding'.

Click 'OK'.

Adding a new service - Continued

Summary	Dates	Purchaser	Provision	Budget Codes

Decision date:	**Start date:**
	Planned end date:
Purchaser	**Worker responsible for purchase:**
	Purchasing team:
Provision	
	Supplier:
Budget Codes	**Budget Codes:**

The following screen will appear.

The Summary screen displays all of the standard settings that will be applied to all of the "elements" (the actual service to be delivered).

The information with the element can be changed at an individual level also.

Click on each tab in turn and add the following information:

Dates

Start Date and End Date (if applicable).

Purchaser

Worker Responsible for Purchase is always yourself and this will populate automatically.
Purchasing Team is always 'SEND Team – Head of Service'
Search simply for 'SEND' and a list will appear.

Provision

This will be the setting which the service user attends

Delivery

Elements will either have a fixed cost; variable cost or no cost. Elements that require a cost will be shown from the summary screen.

Budget Codes

Select the relevant cost centre from the list. A list of cost centres is available separately.

Change Standard Settings **Add Element**

You will have two options at the bottom of the screen. Here you can either amend what you have just done – 'Change Standard Settings' or 'Add Element'.
Note: until at least one element has been added, the purchasing step cannot be completed.

Here you will be presented with a list of elements that can be added, each representing the relevant payment currently in place, select the correct element and click OK and then OK again.
Note: The 'standard settings' for the provision will now be applied to all of the elements in that provision automatically.
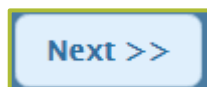
Finishing The Workflow

Ending or Amending an Existing Service

Status
Current

If there is already a current service on a person's record and the band needs to be updated, the existing service can be amended.

If the customer is no longer a part of Special Schools, the service must be ended.

Amending an Existing Service

To amend a service, click the Green Pencil symbol.

This will take you to the Provision screen where you can choose to end the current band element by pressing the 'Red Square' symbol and entering an end date.

A new element can then be added of the correct type. However, instead of clicking 'OK' to add the new element, click 'Next'. This will take you directly into the details of the element where the start date will need to be changed.

Note: the start date of the new element should be one day after the end date of the old element if of a similar type:
E.g. Old Element – End Date 24/03/18
     New Element – Start Date 25/03/18

Ending an Existing Service

To end a service, all that must be done is to click the Red Square on the provision and then enter an end date.

Then the 'finishing the workflow' process must be followed.

Finishing the Workflow

Step 3 – Finishing the Workflow

| CS Purchase Admin Notes C0917 | CS – SEND Purchasing | | | | | |

Provision & Contributions

Service/Element	Element Type	Start Date	End Date	Status	Change Type
Special Schools Banding				Proposed	New
Band G	P	03/07/2018			New

Update 903 Codes   Draft Purchase Orders   Authorisation Tasks   Add Provision

All changes are 'Proposed' until the workflow step is finished.
Click on the tab at the top marked 'CS Purchase Admin Notes C0917'.

Sections

1. Purchase Notes
2. Actions Taken

indicates completed section

On Section 1 – Purchase Notes, you can record any notes that you feel are relevant to the updates that you are making although this is not mandatory.
On Section 2 – Actions Taken, you must add at least one next action to send once the workflow is completed – this is mandatory.

Add
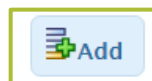
Add and Close

Click 'Add'.
Select action: SEND Purchase Completed (NFA), select a reason from the list.
It is advised that a meaningful next action note is added in addition to the 'reason' selected.
Click 'Add and Close'.

Once all the above has been completed, click the white arrow in the green box (top left) to finish the workflow.

Once this has been pressed, the purchase is final. What you have done can still be amended but you will have to start a new 'SEND Finance Admin' workflow from the start menu.

If you wish to abandon all changes, then click the 'X' (top right) and when you are prompted to save changes, click 'NO'.