

# SIMPLE GUIDE TO PEPs FOR SOCIAL WORKERS

First do some checks on LCS, e.g. is Educational Establishment CURRENT? Is Designated Teacher ACTIVE on LCS Address Book? If not, log REDMINE (helpdesk) call requesting person is added for Professional Portal access (N.B. this can take up to 24 hours for the DT to be selectable from the point at which it was actioned).

Then START INITIAL PEP through FORMS (selecting correct type - see bottom right box). Business Support start SUBSEQUENT PEPs

Click on ASSESSMENT tab and complete first two sections named 'My Personal Information' and 'My Health'.

Once all 6 sections are selected (5 for Early Years) click 'Add New Professional Contributor'. Add Due Date and click CONFIRM, click OK then 'Save and Delegate'. This will generate an email (currently from) [passwordreset@btlancashire.co.uk](mailto:passwordreset@btlancashire.co.uk) to the DT to alert them they have a PEP to complete (good practice would be to follow up with an email to the DT letting them know you have delegated the PEP and to prompt them to look out for the alert email).

From DELEGATE tab click on 6 sections to delegate at left side of screen, which will highlight blue once selected. First section to select is named 'My Personal Information' ending with last section to select named 'Attendees and Next PEP Meeting'.

DT then logs in and populates the PEP via the Professional Portal whilst saving as they go. When they do this you will see a star indicator next to the sections (check from the Assessment tab), which shows they have been accessing the PEP and are in the process of filling it in. Once finished they should click SUBMIT CONTRIBUTION and you will receive a 'Delegated section' alert in your Worktray to flag the return to you.

When the PEP has been returned it needs to be checked. Some PEPs show blank or partially blank - in a lot of cases this is a CACHE issue. To rectify this go through the child's demographic page, click into FORMS and then on the PEP itself rather than accessing via your Worktray. This normally resolves the issue and the information should appear. Check all questions and sections are complete before RE-ASSIGNING to PEPs Business Support Worktray.

## Key things to note

NEVER FINALISE A PEP - reassign to PEPs Business Support noting which term the PEP is from in the Assignment Comments.

To retract a PEP go on DELEGATE tab onto named DT and click to retract form (this will LOSE information contained within the form, so only use if necessary).

If a PEP needs to be amended or RE-DELEGATED back to the DT due to missing information, it needs to be activated (unlocked). From the DELEGATE tab click on the row where the DT's name shows and then click the 'Activate completed sections' hyperlink. You can then enter information from the Assessment tab once more.

## \*TERM DATES\*

AUTUMN - 1st September to 31st December

SPRING - 1st January to 31st March

SUMMER - 1st April to 31st August

ALL children from 2 years of age in Nursery provision require a termly PEP and from 4-17 ALL children require a termly PEP regardless of whether they are in education or not.

## \*FORM TYPES\*

Early Years - Nursery and Reception year group

Primary Mainstream - Y1 to Y6

Secondary Mainstream - Y7 to Y11

Key Stage 5 - Y12 to Y13

Primary Special - Y1 to Y6 at special school

Secondary Special - Y7 to Y13 at special school