



NOTES : Once you have created a new document from the list available to your organisation you will be able to assign users to sections for them to respond.			
1.	Main Dashboard From the dashboard select the SEND Module.		
2.	Choosing your Pupil Choose the pupil that you wish to create a new document for from the pupil picker. <i>See 'How to use</i> <i>Pupil Picker'</i> .	Search Q All Groups V Available: 403 Aaban Musa FSM PPICLA Aadi Nabendu SENEAL V Aanni Shari EAL Adam Adamsscm FSM PPIC	
3.	Creating a New Document Click on New Document to create a new document.	Students Selected: 1 Pupil: Aaban Musa New Document	
4.	Select your Form Type Choose the type of form from the dropdown list.	Create new document × en Form Select Form • u Authority Solect Form Create Docume My Plan New EHCP Provision E Review of EHCP Transfer to EHCP	

5.	Choose your Authority Form From the list of Templates available to you, select the one that you wish to create. Click Create Document.	Create new document ey rook - Changes to S
		Form My Plan uments (1) beth - EHC Plan YR Create Docume Select Authority_ Individual Education Plan Student Behaviour Sheet Student Profile Transition Profile
5.	Messages If you receive this message, it means that someone else has already created a document of the same type. This document will override the current opened document if you click Create New Document.	Educater There is already a document in progress! Starting a new document will close the current document without signing it off Create New Document Cancel
	Viewing Sections	Documents
7.	The sections for the template will appear on the right-hand side.	Responsibilities Aaban Musa's Details Target(s) Suggestions

8.	Responsibilities	Aaban Musa AM Nursery 2 Individual Education Plan - My Plan Document creator with full access: Gill Watson
	require completion.	Use the sections below to add other to the access list.
		Full Access Select Users
		Aaban Musa's Details Select Users
		Target(s) Select Users
		Suggestions Select Users
		File Upload (s) Select Users
		Document Sign Off Select Users
9.	Allocating Responsibilities	
	Click in each section to allocate users who will have the	Target(s) Target(s)
	responsibility of answering the	Gareth Webb ×
	questions. A list of all your users will appear. Allocated users will	Gareth Webb Gill Watson Holly McLeod Gill Watson Holly McLeod
	receive a notification to advise	