SUBMITTING A FORM ON THE PLYMOUTH PROFESSIONAL PORTAL

Early Help (EHAT) & 0-25 SEND Statutory Assessment Team
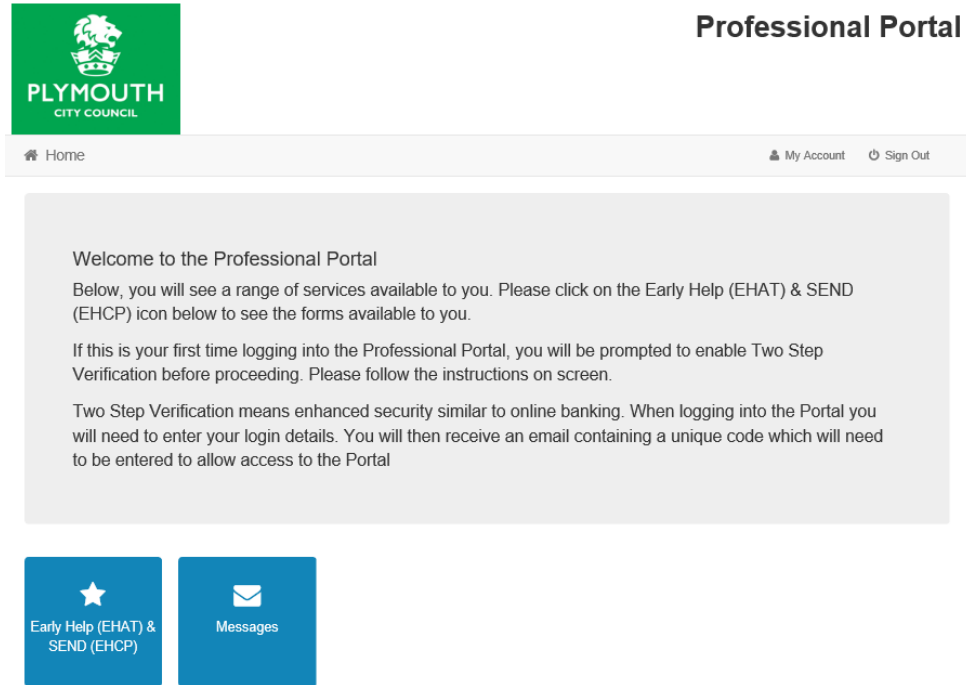
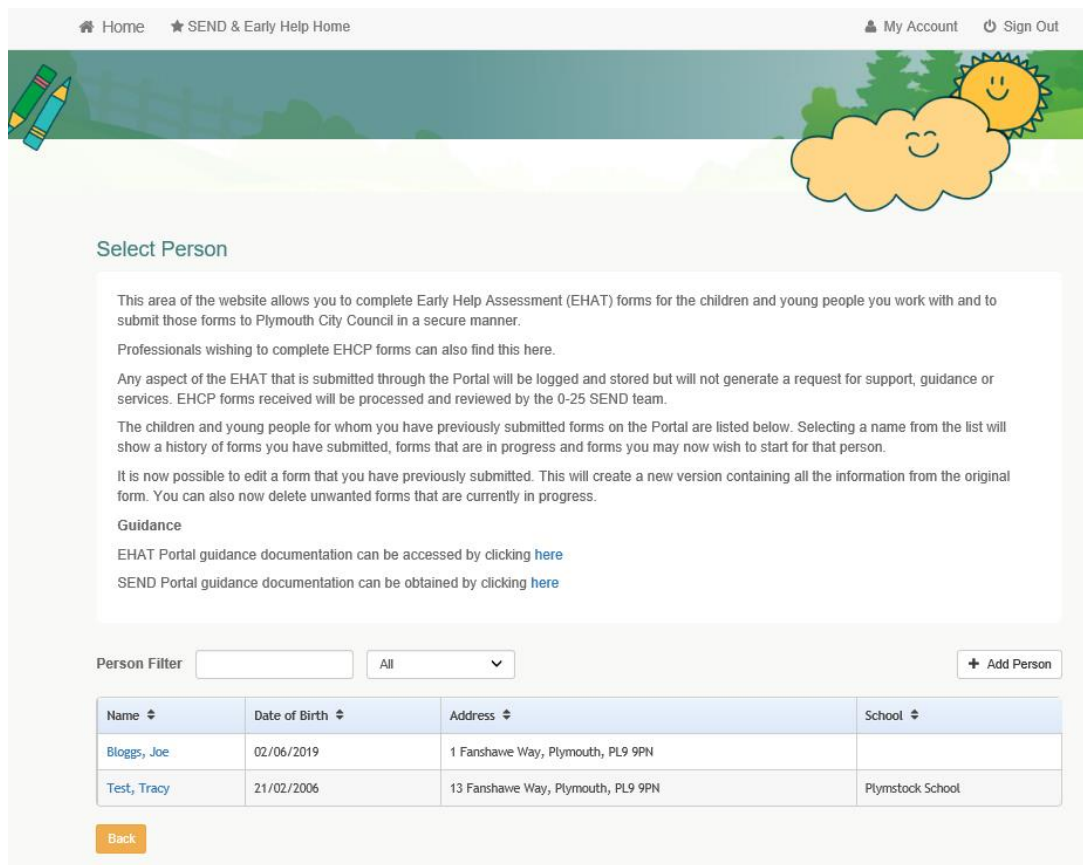## Contents

NAVIGATING TO EARLY HELP (EHAT) & SEND (EHCP)

To access the SEND and Early Help area of the Portal select the icon highlighted below from the home page.

The following screen will appear…

FORM SELECTION

If you have added a new pupil/young person to your pupil/young person list, the Add Child process will take you into their record and then onto the Pupil/young person History screen – see Pupil/young person History section below.

If however you have previously added a form for a pupil/young person using your current user account, this pupil/young person will be available in your pupil/young person list and you can search for them using the pupil/young person filter to add a further form. See below. Pupil/young person lists are specific to user accounts.

Select a Pupil/young person
To add a Portal form for a pupil/young person:

- After logging in to the SEND Professional Portal, search for the pupil/young person in your list of

  pupils/young people. To do this click into the **Person Filter** [   ] and

  start to type the legal name of the pupil/young person. If the pupil/young person you are searching for is

  not already available in your list, add a new person record by clicking on **+ Add Person**

  Follow the instructions in the previous section of the guide to add a new pupil/young person record

  using the **+ Add Person** button.

- Click on the blue hyperlink name of the pupil/young person.

Name ⬍	Dat ⬍
Test, Molly	30/

- This will open the pupil/young person history screen and display any previous forms that have been submitted for this pupil/young person.

You will be prompted to check the current details relating to the pupil/young person. It is very important that these details are accurate and up to date. If the pupil/young person has moved home address since the previous form was submitted, please overtype the postcode field with the new post code and click on the Find address button to select the new address

Find Address

- If you cannot find the new address in the address list, please add the address manually using the instructions earlier in this guide.
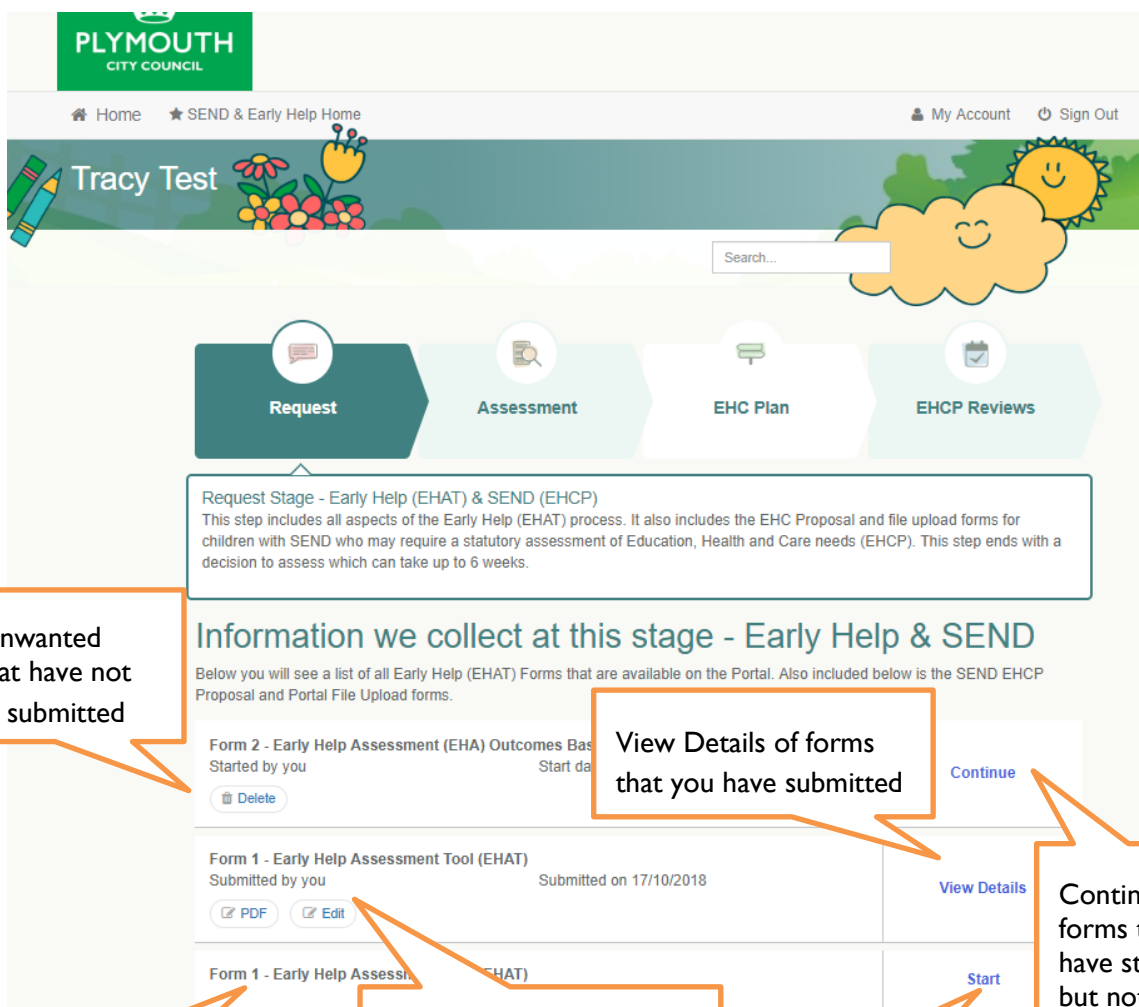
- Check the pupil/young person details carefully against your school/FE college database.

- If no pupil/young person details have changed since the last form was submitted click continue to proceed to the next step.

EARLY HELP & SEND HOME PAGE

The following screen shows the Early Help and SEND main home page. This contains all the forms available to start along with any forms that you have already started or submitted for a particular child.

The home page contains four process steps; Request, Assessment, EHC Plan and EHCP Reviews. For Early Help everything you need will be in the Request panel (the other steps are specifically for SEND).

From here you can start a new form, continue a form you have started previously, view details of forms you have submitted, delete any unwanted forms that you have started but not submitted, edit a form you have submitted previously (creating a new version) and print a copy of a form you have submitted.

STARTING A NEW FORM

From the form selection page, click on the start button of the form that you would like to complete. Each form name will include the current form version number. This may be different from the version number in the example below.

Please note: You can only have one type of form in progress at any one time for example; if you have started an EHAT form and not yet submitted, it will not be possible to start another until the form in progress has been either submitted or deleted.

Form 1 - Early Help Assessment Tool (EHAT)	Start
Form 2 - Early Help Assessment (EHA) Outcomes Based Plan	Start
Form 3 - Early Help Assessment (EHA) Review	Start
Form 4 - Early Help Assessment (EHA) Closure	Start
Form 5 - EHCP Proposal Form	Start
Form 6 - EHCP Portal File Upload	Start

- Choose the work role relating to your log in and click   Select

Testing Case - Work Details

Please select the Professional Role you would like to complete this form as. If you would like to complete this form as a different Professional Role that you have not yet added to your Professional Portal account, then please navigate to My Account then select Work Details to add a new Professional Role. If your Organisation Name, Work Address, or contact details have changed for your Professional Role, then please navigate to My Account then select Work Details to update these details.

SEN Co-ordinators

Organisation Name
PCC

Address
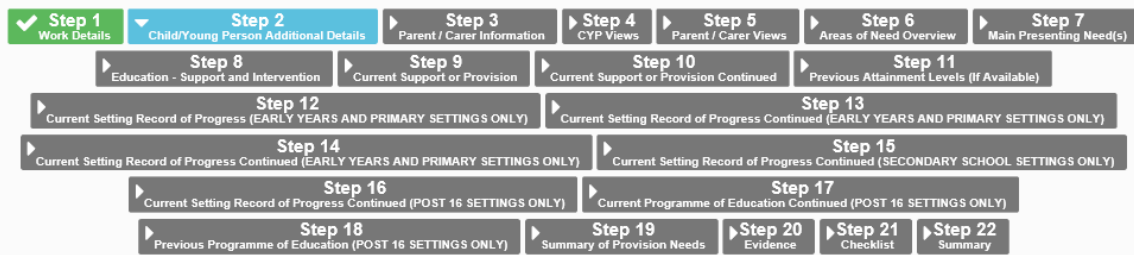Ground floor, Windsor House, Tavistock Road, Plymouth, PL6 5UF

Work Phone
451582852

Mobile Number
741852852

Select

- The Select button will take you to the head of the form, which displays the crumb trail that can be used to navigate back through parts of the form that have already been completed.

- Below is an example of a crumb trail. Steps that are coloured green are complete and can be returned to by clicking on the Step in the crumb trail. Steps that are coloured blue are your current Step. Steps coloured grey are incomplete. You can only navigate back to completed steps, not forward to incomplete steps
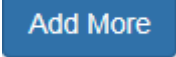
★ Special Educational Needs and Disabilities

Testing Case

| ✔ Step 1 Work Details | ▼ Step 2 Child/Young Person Additional Details | ▶ Step 3 Parent / Carer Information | ▶ Step 4 CYP Views | ▶ Step 5 Parent / Carer Views | ▶ Step 6 Areas of Need Overview | ▶ Step 7 Main Presenting Need(s) |

| ▶ Step 8 Education - Support and Intervention | ▶ Step 9 Current Support or Provision | ▶ Step 10 Current Support or Provision Continued | ▶ Step 11 Previous Attainment Levels (If Available) |

| ▶ Step 12 Current Setting Record of Progress (EARLY YEARS AND PRIMARY SETTINGS ONLY) | ▶ Step 13 Current Setting Record of Progress Continued (EARLY YEARS AND PRIMARY SETTINGS ONLY) |

| ▶ Step 14 Current Setting Record of Progress Continued (EARLY YEARS AND PRIMARY SETTINGS ONLY) | ▶ Step 15 Current Setting Record of Progress Continued (SECONDARY SCHOOL SETTINGS ONLY) |

| ▶ Step 16 Current Setting Record of Progress Continued (POST 16 SETTINGS ONLY) | ▶ Step 17 Current Programme of Education Continued (POST 16 SETTINGS ONLY) |

| ▶ Step 18 Previous Programme of Education (POST 16 SETTINGS ONLY) | ▶ Step 19 Summary of Provision Needs | ▶ Step 20 Evidence | ▶ Step 21 Checklist | ▶ Step 22 Summary |

- To complete a Step (page on the form); click on **Save & Continue** at the foot of the screen. This will save the form with data at the current point of completion and move onto the next Step.

- Should you close the form without clicking **Save & Continue** at the bottom of the current Step; data on the current Step will not be saved. You may however close the form without submitting it and return to it to complete further data entry. You can submit the form at any stage providing all necessary data has been completed.

- You will not lose any saved data you have already entered, provided you have clicked on the **Save & Continue** button at the foot of your current Step.

- You may not click **Save & Continue** until all mandatory fields on the current Step have been completed.

- **WARNING There is currently a 30 minute expiry time on portal screens**. You must save the page you are working on at least every 15 minutes to ensure the system does not log you out. If there are any mandatory fields on the screen you will need to complete these to be able to save the page. You will not lose work on previous pages if Save and Continue has been clicked successfully within the 15 minute time-out period.

ADDING DATA

Add More Button

The Add More button   Add More   sits at the bottom of some, but not all Steps. The function of this button is to allow you to add a further record to the step you are on. Examples of this are:

- Adding an additional parent/carer record
- Adding additional Outcomes
- Adding additional Contributors to forms

PLEASE NOTE that at present, when you click the Add More button, you will need to scroll down the page you have already completed to where the new section of the form you have created starts. There is currently no clear indicator where the new data record starts after the existing record has ended.

RETURNING TO AN INCOMPLETE FORM

If you do not complete and submit a form and need to return to it to finish entering data, you may do so as data is saved page by page as you complete the form.

To re-enter an incomplete form:

1. Log in with your user name and password.

2. Click on:
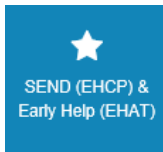
3. Select the pupil/young person whose form you need to complete,
4. Click continue on the pupil/young person details
5. This will take you to the pupil/young person history page where you will see a "Continue" button against the unsubmitted form
6. You will enter the form at the point you left it. However, if you left the form on the Summary screen, you will need to go to the foot of the Summary page and click on the "**Back**" button to be able to enter the main body of the form.

ATTACHING EVIDENCE AND SUPPORTING DOCUMENTS

Certain sections within Portal forms allow the uploading of documents

To upload a document:

1. Check that the file meets the requirements in terms of file type and file size.
    These are files with the file extensions: doc, docx, pdf, jpeg, jpg and bmp can be uploaded to the Professional Portal. The maximum single file size for upload is 10 MB. File larger than 10MB should be scanned into separate documents and uploaded separately.

    When uploading evidence we would appreciate the documents to be named in the following way: dd-mm-yyyy Type of Report (Author) e.g. 01-01-1900 CIT Report (Dr Sample)

2. Check the upload instructions.

Please attach files here

- Please ensure that your files have the correct extensions, these should be .doc, .docx, .pdf, .png, .jpeg, .jpg, .bmp
- The maximum file size allowed is 10MB
- By uploading this file, you are confirming that it is free from viruses or other malware and contains no inappropriate material. If the file contains images of people, please ensure you have their consent for the image to be shared
- You must upload each file by selecting the upload button for the file to be added to the form

3. Click on the Browse button.

4. Using the standard Windows browser, navigate to the file that you want to upload
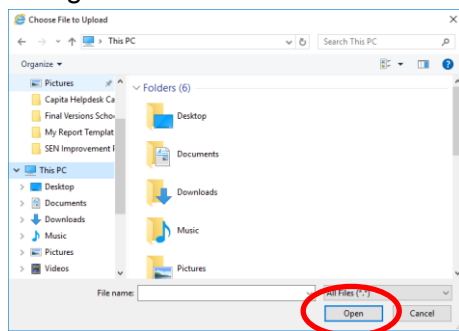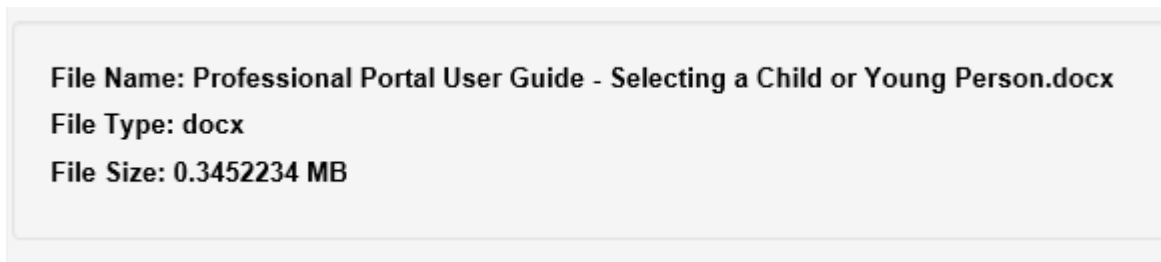

5. Click to highlight the file you want to upload and click on the Open button in the browse window. The file name will appear in the browse field.
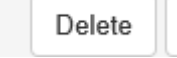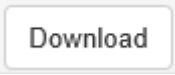

6. Click on the [Upload] button to upload the file   You will see a message showing that the file

    is uploading

7. Once the file has uploaded successfully you will see the details of the file displayed on screen.
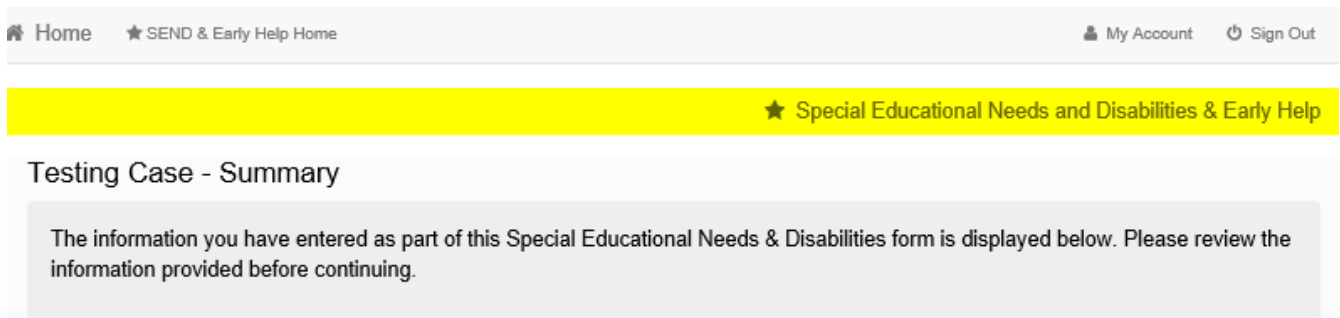
File Name: Professional Portal User Guide - Selecting a Child or Young Person.docx
File Type: docx
File Size: 0.3452234 MB

8. If you wish to remove the file after it has been uploaded, click on Delete

9. If you wish to see, or check, what you have uploaded click on Download to view a copy of the file.

10. To upload further documents to that section, click on Add More for each additional document you wish to upload to that section. This will open further file browsers.

CHECKING AND SUBMITTING DATA

The final Step on the form takes you to a Summary screen. The screen displays all data entered ready for checking. The summary form can be printed from the internet browser by right clicking on the form on-screen and choosing the Print option.

Forms are locked for editing once they have been submitted in the Portal. If data on a form needs to be changed, a new form must be completed and resubmitted. Therefore to avoid unnecessary work it is vital that **all information is checked for accuracy prior to submission of the form** as this cannot be unlocked once submitted.

Summary Screen:

🏠 Home	★ SEND & Early Help Home		👤 My Account	⏻ Sign Out

★ Special Educational Needs and Disabilities & Early Help

Testing Case - Summary

The information you have entered as part of this Special Educational Needs & Disabilities form is displayed below. Please review the information provided before continuing.

"I AGREE" SUBMISSION DECLARATIONS

At the foot of the Summary Screen, there are 2 declarations. One is a summary statement requesting confirmation that the school/FE college have permission to submit data about the pupil/young person and that all data is correct to the best of the school/FE college's knowledge.

The other is a declaration that relates to the use of the portal to submit Education Health and Care Plan information.

When all the information input into the form has been checked and confirmed as correct, click on both the

☐ **I agree** boxes and then on   Submit Form

Once   Submit Form   **has been clicked, the form is submitted to the Local Authority for**

processing and the form is no longer editable.

When the form has been submitted, the screen returns to the Child History screen where the date flag for the current form will have changed from amber, showing the last saved date, 15/02/2017 to green showing the submitted date.   17/01/2017

ASSISTANCE

For assistance on the EHCP Portal forms please contact the SEND 0-25 Team
senadmin@plymouth.gov.uk

For assistance on the Early Help Assessment (EHAT) forms please contact
gatewayadmin@plymouth.gov.uk

For technical support on accounts or passwords, please contact
EHCPPortal@plymouth.gov.uk

Plymouth City Council SEND Team – School Support https://www.plymouth.gov.uk/
sendsasstrategicadviceandsupport2