Education, Health and Care Hub Documentation

EHC Hub Parents' Guide

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About this document

This document is a generic guide for parents, carers and young people on using the EHC Hub. It is intended as a basis for local authorities to use to produce their own version, specifically tailored for their local communities.

Local authorities may choose to add additional best practice information that reflects local policy/ process or divide the document up into a number of shorter documents that specifically focus on certain areas of the EHC Hub

Introduction

Since the introduction of The Children & Families Act 2014 and the SEN Code of Practice (2014), local authorities across England have been implementing new processes and pathways to support children and young people with Special Educational Needs and / or Disabilities (SEND). In place of Statements and Learning Disability Assessments, local authorities have a duty to provide an Education, Health & Care Plan (EHCP) for children and young people aged up to 25 who need more support than is already available.

At the heart of the new legislation is a vision of collaborative working across Health, Education and Social Care and an engaging person-centred approach to the whole EHC pathway. However, the administrative processes currently in place to facilitate such an approach is a significant barrier that has left many local authorities struggling to sustain the volume of work, as well as to meet the statutory timeframes set by the Code (SEND Code of Practice 2014).

For many local authorities, the years since the introduction of the reforms has been a challenging period of significant change set against the backdrop of increased demand and ever-challenging budgets. A new way of working is needed, that not only supports local authorities to meet their statutory obligations more efficiently, but that achieves the SEND Code's core principle of the child or young person being at the heart of everything we do.

Idox's EHC Hub is an innovative digital platform for families, professionals and education settings to engage, contribute and collaborate on EHC assessments, plans and reviews. It provides an end-to-end solution for the two core statutory pathways: The twenty-week assessment and planning process and subsequently, the review of those EHC Plans. It puts the child or young person and their family at the heart of these processes and provides easy, secure access for all other case stakeholders to actively contribute and view information.

Putting children, young people and their families at the heart of the EHC process

For children, young people and their families, the Hub can be a one-stop digital resource for them to access and contribute information throughout their EHC journeys. It can be accessed 24 hours a day on a smartphone, tablet or computer and is designed to be easy and intuitive to use without any need for formal training.

One of its most powerful features is the opportunity that it provides to truly capture the child or young person's voice. The *About Me* and *My Parent / Carer's Views* areas are unique multimedia spaces for uploading short video clips, photographs and scanned documents alongside written text to capture a dynamic narrative about their aspirations at the assessment stage, and later for Section A of the EHC Plan.

For children, young people and their families, the EHC Hub offers:

- Online EHC assessment request pathway, including uploading/ sharing reports and or documents
- EHC case tracker with clear, contextual information advice and guidance as well as complete visibility of the statutory timeframes that relate to their case (review and assessment)
- Multimedia spaces to capture the child, young person & families views
- Secure 24/7 online access to all key information, documentation and reports
- Draft EHC plan consultation with ability to submit comments and feedback
- EHCP Review meeting information and invitations

- Ability to provide views/ feedback ahead of the EHC Review meeting
- Automated email alerts and notifications of case updates
- Access for advocates or independent support workers
- Access to multiple child/ Young person's cases via the one login
- Download and save/ print all online case information
- Visibility of the Case Timeline to see all recent case activity

This document is to assist young people, parents, carers or guardians in their use of the EHC Hub.

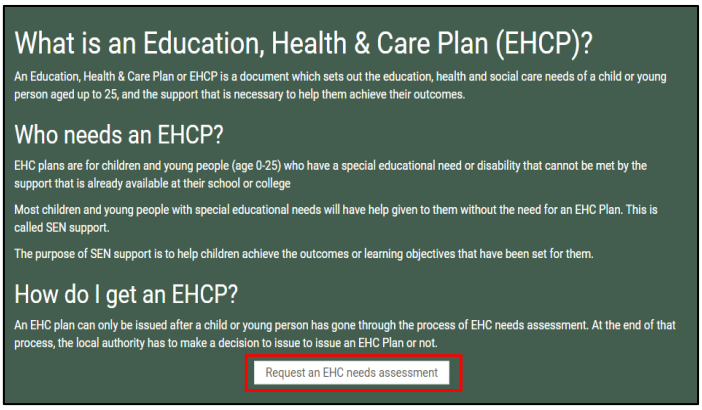
The Needs Assessment Request Process

The process to request a needs assessment is as follows:

1. The parent/carer/guardian or Young Person over 16 completes the request details and clicks on Send Request.
2. The request is processed by the local authority.
3. The local authority will grant access and send login details to the email provided as part of the request.
4. The parent/carer/guardian or Young Person over 16 will then register and log in to amend the details and upload any documents if required.

Because an account is not required to request a needs assessment, it is not possible to save a request part way through the process and then come back to it later. It is also not possible to upload documents during this part of the request process. Once the request has been sent to the local authority, and the parent/carer/guardian or Young Person over 16 has registered, you will be able to access the request to amend it and upload any documents if you wish to.

You will be directed to the EHC Hub Needs Assessment Request from the local authority website. The following page will appear:



This page provides information about what an Education, Health and Care Plan is, who needs one and how to get one. Read the information and click on the Request an EHC Needs Assessment button at the bottom of the page and the following page will appear:

This will provide more information on the Education, Health and Care Plan. Read the information and click on Request an EHC Needs Assessment to begin the process of requesting an assessment.

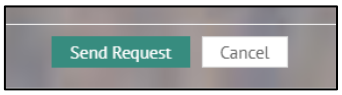
This will open the request form ready for completion. As mentioned previously, because an account is not required to request a needs assessment, it is not possible to save a request part way through the process and come back to it later. It is also not possible to upload documents during this part of the request process. Once the request has been sent to the local authority, and the parent/carer/guardian or Younger Person over 16 registered, you will be able to log into the EHC Hub and access the request to amend it and upload any documents you wish. (Click here for details on Registering for the Hub.)

The following page will appear:

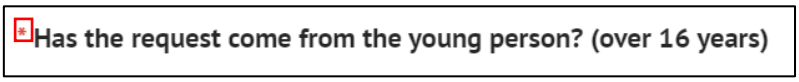
After the Information sharing and data protection Statement and the Consent section, there are five sections to be completed. These are:

1. Details of person requesting an EHCP Assessment
2. Child or young person's details
3. Child or young person's main contacts (family and involved professionals)
4. Details of the child or young person's current education setting(s)
5. Important information about the child or young person

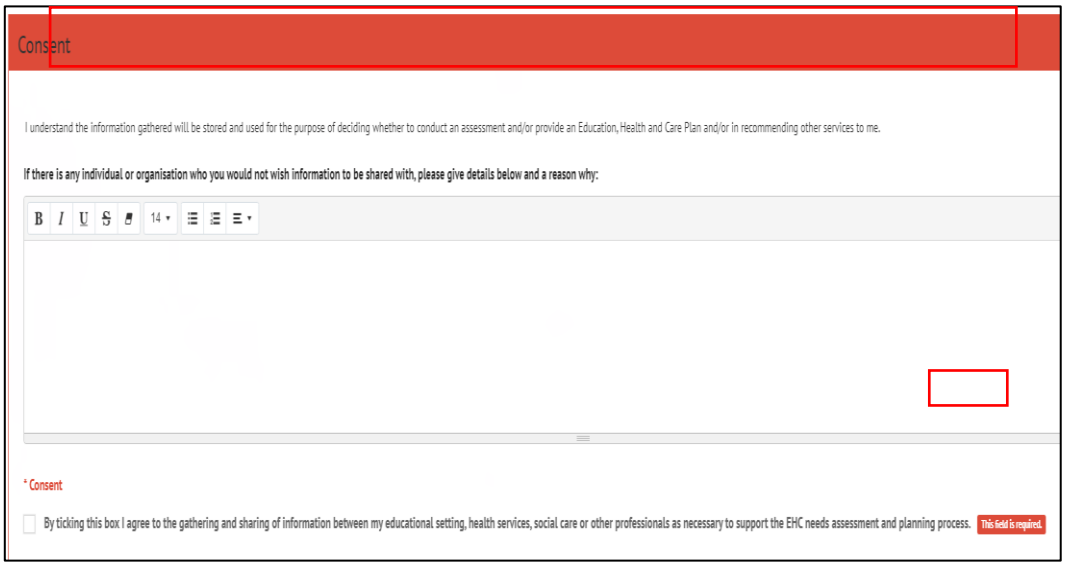
When all the required information has been entered, you will need to click on Send Request at the bottom of the form:



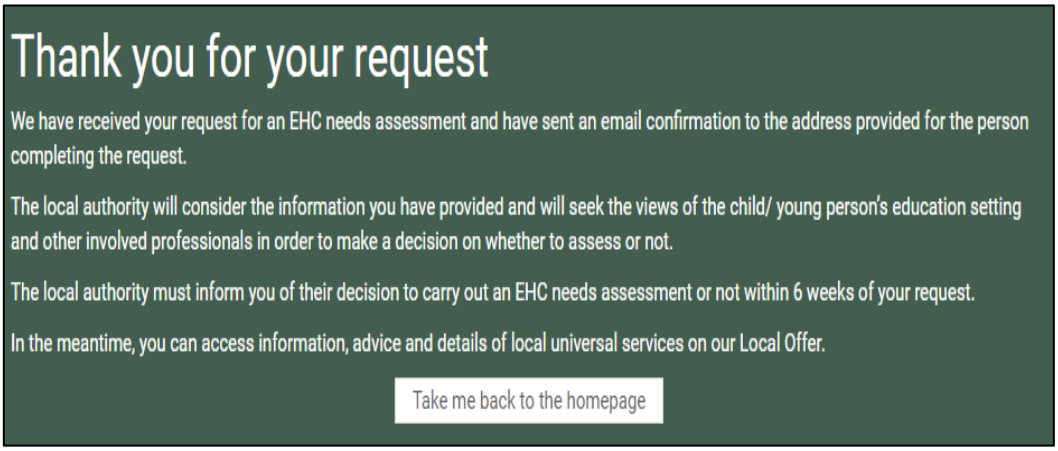
There are certain fields that are required and that must be completed in order for the request to be sent. These are indicated with a red asterisk:



If information has not be entered into a required field, when the Send Request button is clicked on, the section header containing the required information will turn red and the field to be completed will be shown with a message saying "this field is required"



Once all the information is entered correctly, click on Send Request. The following message will be displayed:

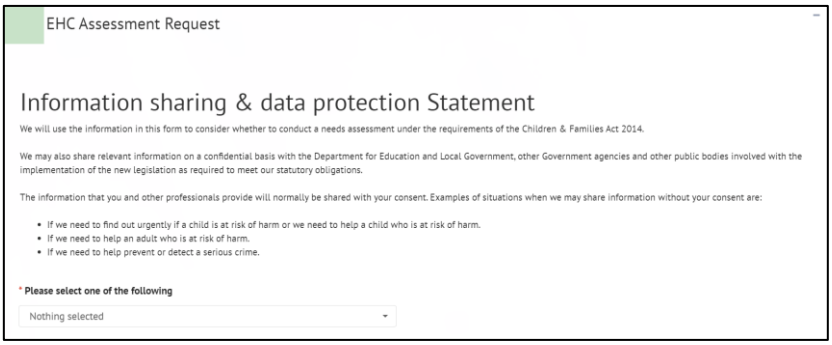


Provided you have entered your email address in Section 1 of the request (Details of person requesting an EHCP Assessment), then you will be sent an email to confirm that your request has been submitted.

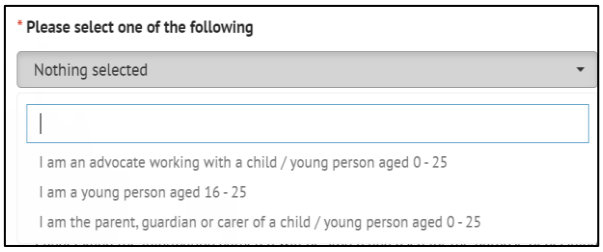
Completing a Needs Assessment Request

The following sections contain details on how to complete the different sections of the needs assessment request, if you are the person making the request. If the request has come from the School, this information may have already been completed. If this is so, click here for information on how to register and how to contribute to a needs assessment request.

Information sharing and data protection statement

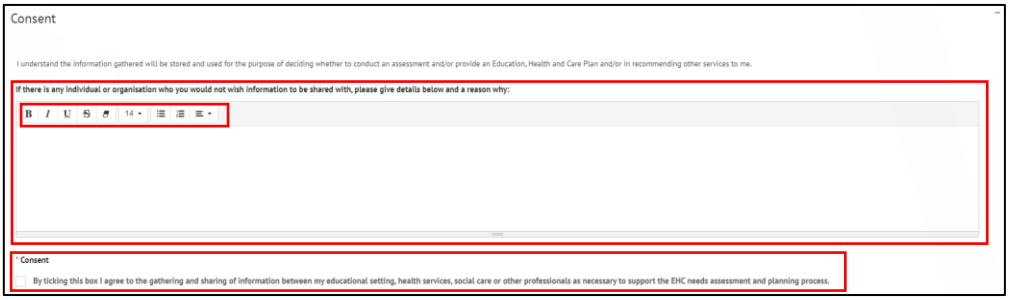


Read the information and click on the down pointing arrow at the end of the Nothing Selected field to view the options available for selection. Left click on the correct description.



Your chosen option will be displayed in the field:

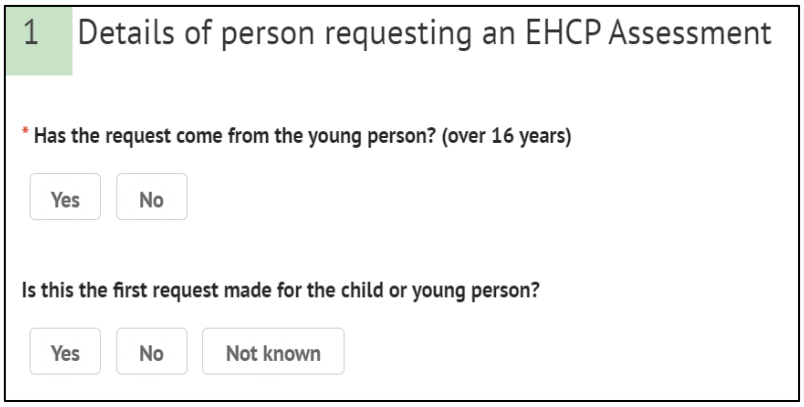
Consent



When giving consent, if there are any individuals or organisations that you do not wish information concerning the assessment to be shared with, details as to who and why can be entered here. Click here for more information on using free text fields.

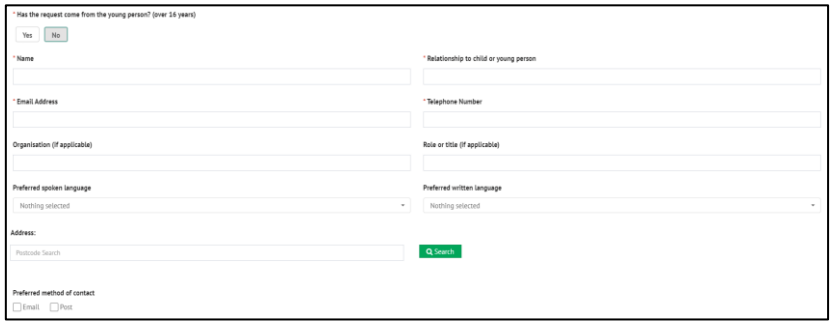
Consent - Left click on the tick box to give consent. You will be unable to send the request for an assessment unless consent is given.

Details of person requesting a EHCP Assessment



If you are completing this request on behalf of yourself and you are over 16, click on Yes.

If you are completing the on behalf of a someone else, click on No. The following extra fields will be displayed for the details of the person making the request to be entered:



Name – Enter your name.

Relationship to child or young person – Enter the nature of the relationship between yourself and the young person e.g. Father.

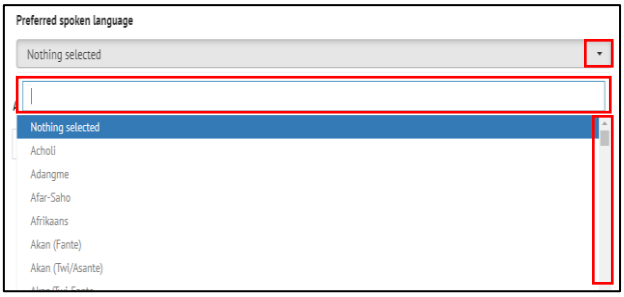
Email Address – Enter your contact email address if you are the person making the request. When the request has been completed and sent, a confirmation email will be sent to this email address to show that an assessment request has been sent.

Telephone Number – Enter your contact telephone number if you are the person making the request for the assessment.

Organisation – If you are making the request for this young person on behalf of an organisation, enter the organisation name here.

Role or Title – Enter your job role or title in the organisation if applicable.

Preferred spoken language – click here for more information on using pick list fields:



Preferred written language – click here for more information on using pick list fields .

Address – click here for more information on using address fields

Preferred method of contact – select if you would prefer to be contacted by email or post

Is the first request made for the child or young person – select Yes, No or Not known as applicable. If No is selected, enter the date a previous request was made, if known.

Child or young person's details

First name – enter the first name of the child or young person the request for an assessment is for.

Last name – enter the last name of the child or young person the request for an assessment is for.

Middle name(s) – enter the middle name(s) of the child or young person the request for an assessment is for.

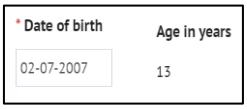
Preferred name – enter the preferred name of the child or young person the request for an assessment is for.

UPN – local authority office use only. This should be left blank.

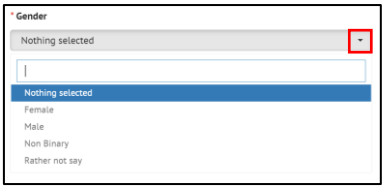
Internal system reference – local authority office use only. This should be left blank.

Date of Birth – Type in the date of birth, with a dash between the day, month and year. Click here for more information about using date fields.:

Once the date has been selected, the age will be calculated and displayed automatically:



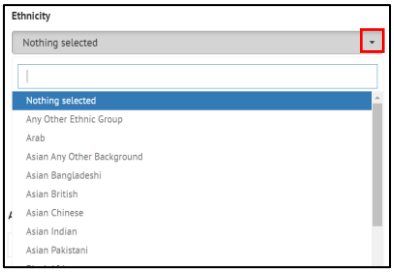
Gender – Click here for more information on how to use pick list fields:



NHS Number – Enter the NHS Number of the child or young person

Legal Status – Click here for more information on how to use pick list fields:

Ethnicity – Click here for more information on how to use pick list fields:



Preferred spoken language – Click here for more information on how to use pick list fields:

Preferred written language – This will automatically default to the preferred spoken language but can be amended if not correct. Click here for more information on how to use pick list fields

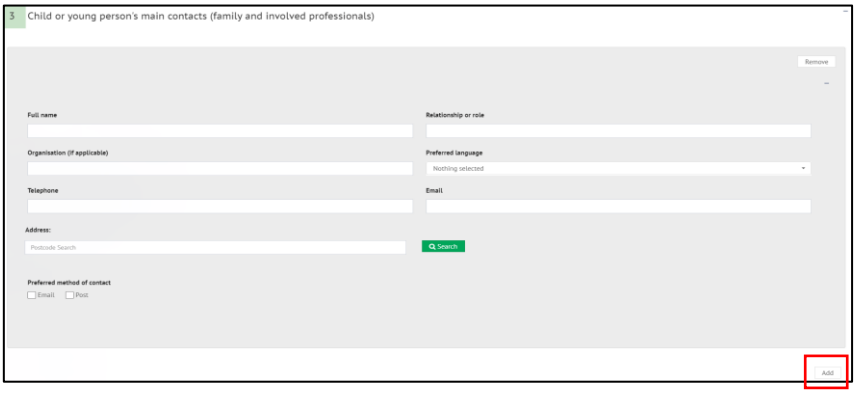
Main telephone – enter the main telephone number for this child or young person.

Email address – enter the email address of the child or young person. This is NOT the email address any confirmation emails or requests for registration will be sent to and is just for information.

Address – See here for more information on how to use address fields

Preferred method of contact – select if the young person would prefer to be contacted by email or post, if appropriate.

Child or young person's main contacts (family and involved professionals)



This section is for details of any contacts for the child or young person the request for an assessment is being made for.

Full name – enter the name of the Full Name of the contact e.g. John Smith

Relationship or role – enter the relationship between or the role of the contact to the child or young person the request for an assessment is being made for. E.g. Father

Organisation (if applicable) – if this contact is part of an organisation (as opposed to a family member), enter the name of the organisation here

Preferred Language – Click here for information on how to use pick list fields

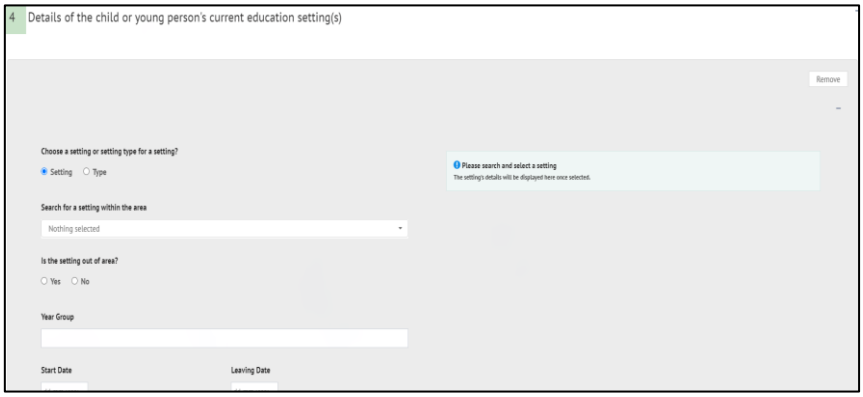
Address – Enter the details of the contact for the child or young person. See here for more information on how to use address fields.

Preferred method of contact – select the preferred method of contact for the child or young person's contact.

It is possible to add more than one contact to the assessment. To add further contacts to the request, click on the Add button in the bottom right-hand corner and complete the fields as above. This can be done as many times as required.

To remove a contact, click on Remove in the top right-hand corner of the section:

Details of the child or young person's current education setting(s)



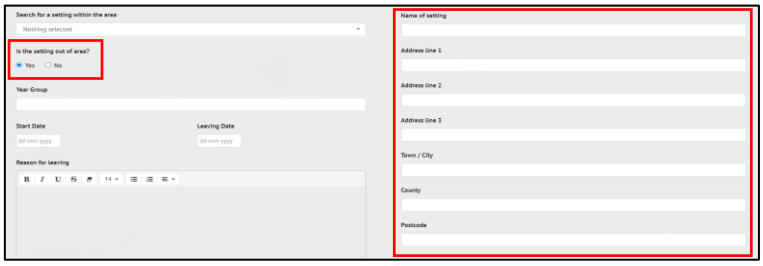
It is possible to add an educational setting either based on the setting itself (e.g. the actual name of the education setting) or based on the type of setting (e.g. Mainstream school, Special school: Non-maintained etc). The details available to be completed will be based on if Setting or Type is selected.

Setting

If Setting is selected, the screen will look like this:

Search for a setting within the area – Click here for more information on using Pick Lists:

If the setting is not on the list, click on Nothing selected and click on Yes to the next question, Is the setting out of area. The setting can then be added manually in the fields on the right:

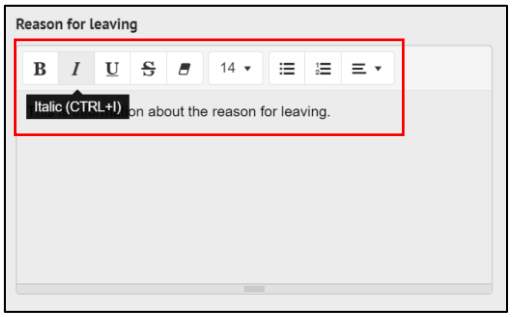


Year Group – enter the school year group of the child or young person.

Start Date – Type in the date the child or young person started at the educational setting. Click here for more information on using date fields:

Leaving Date – if known, enter the date the child or young person left or will leave the education setting

Reason for leaving – Enter a reason for leaving. Click here for more information on using free text fields:

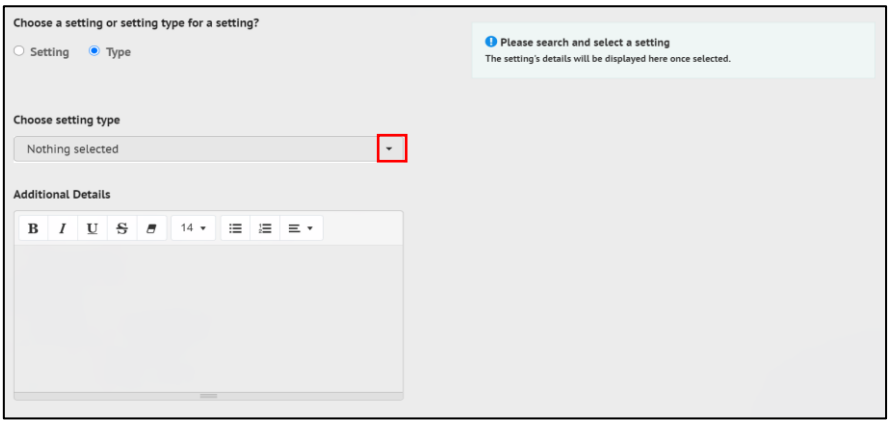


Percentage attendance of child or young person in the last year and any comments on this – Click here for more information on using free text fields:

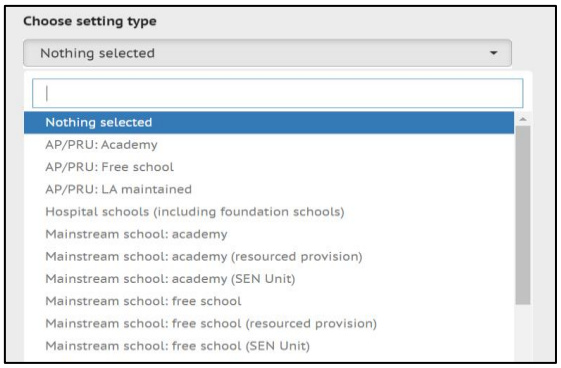
Additional Details - Click here for more information on using free text fields:

Type

If type is selected, the screen will look like this:



Choosing setting type - Click here for more information on how to use pick list fields :



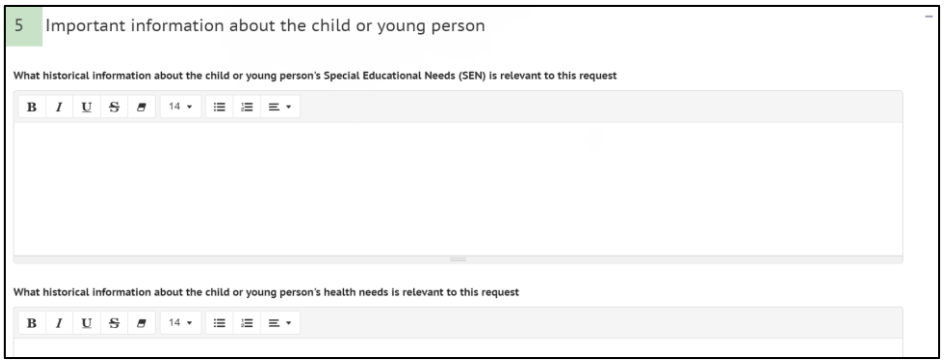
Left click on the required option to select it.

Additional details – click into the field to enter information. Click here for more information on using free text fields

Multiple education settings can be added. To add further education settings to the request, click on the Add button in the bottom right-hand corner and complete the fields as above. This can be done as many times as required.

To remove an education setting, click on Remove in the top right-hand corner of the section.

Important information about the child or young person



The section is used to enter historical information relevant to the request.

What historical information about the child or young person's Special Educational Needs (SEN) is relevant to this request – Click here for more information on using free text fields:

What historical information about the child or young person's health needs is relevant to this request – Click here for more information on using free text fields:

What historical information about the child or young person's social care needs is relevant to this request – Click here for more information on using free text fields:

Was the child or young person involved in the discussion that led to this request – click on Yes or No

If Yes is selected, the following fields will be displayed, A Views and opinions of the child or young person:

What is working well for you in your current education setting? – Click here for more information on using free text fields:

What is not working well for you in your current education setting? What do you think might help – Click here for more information on using free text fields:

If No is selected, the following field will be displayed:

Please explain why – Click here for more information on using free text fields:

Has the parent(s) or carer(s) been involved in the discussions that led to this request – left click on Yes or No.

If Yes is selected, the following fields will be displayed, b Views and opinions of the parent(s) or carer(s):

What is working well for the child or young person in their current education setting? – Click here for more information on using free text fields:

What is not working well for the child or young person in their current education setting? What do you think might help? - Click here for more information on using free text fields:

If No is selected, the following field will be displayed:

Please explain why – – Click here for more information on using free text fields:

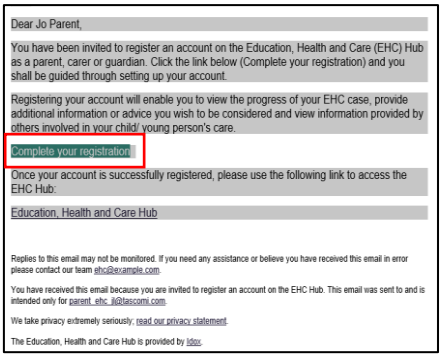
How to Register for an Account

Once the request has been sent to the local authority, they will contact you by email to register on the EHC Hub so you can access and amend the details of the request and upload any documents if required. In order to access the Hub, you will need a username and password. There is also a second level of security (known as two factor authentication) which will involve the entering of a six-digit code provided to you either by an authentication app or a text message. See here for details on this. The username will be your email address.

You will receive an email:

Test - Idox EHC Hub	You have been invited to register on the EHC Hub

The email will look like this:



Dear Jo Parent,

You have been invited to register an account on the Education, Health and Care (EHC) Hub as a parent, carer or guardian. Click the link below (Complete your registration) and you shall be guided through setting up your account.

Registering your account will enable you to view the progress of your EHC case, provide additional information or advice you wish to be considered and view information provided by others involved in your child/ young person's care.

Complete your registration

Once your account is successfully registered, please use the following link to access the EHC Hub:

Education, Health and Care Hub

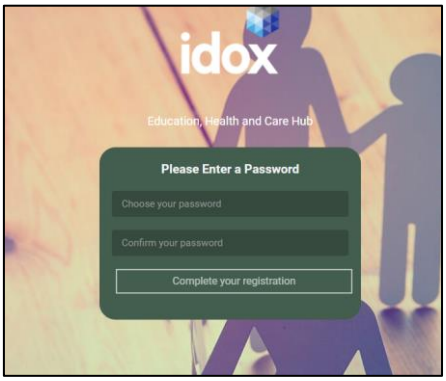
Replies to this email may not be monitored. If you need any assistance or believe you have received this email in error please contact our team ehc@example.com.

You have received this email because you are invited to register an account on the EHC Hub. This email was sent to and is intended only for parent_ehc_ii@tascomi.com.

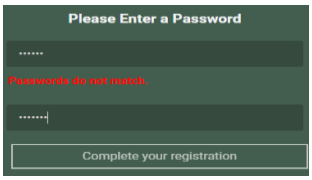
We take privacy extremely seriously; read our privacy statement.

The Education, Health and Care Hub is provided by Idox.

Click on the Complete your registration link in the email. The following page will appear:

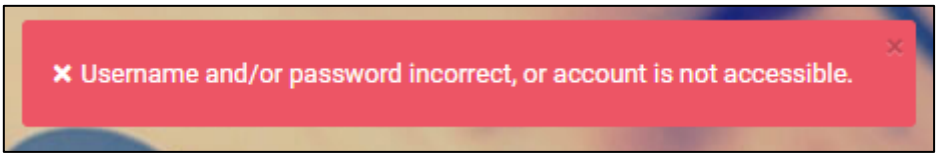


Enter a password for your EHC Hub account in the Choose your password field. This must be at least 6 characters long. Enter the password again in the Confirm your password field. If the two passwords don't match, you will get a warning message prompting you to type it again. You won't be able to complete your registration unless the two passwords match:



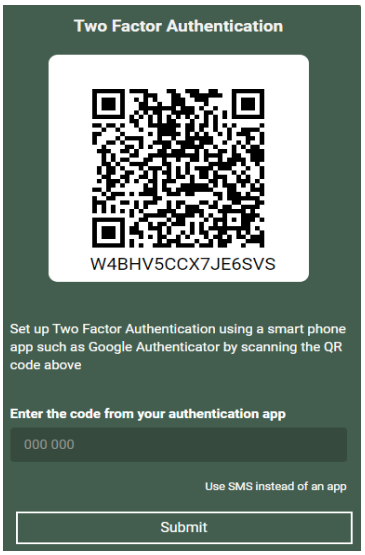
Click on Complete your registration.

If there is a problem with your account, this message will appear in the top right-hand corner of the screen:



In this case, check you are entering the correct username (your email address) and password (just created). If problems persist, please contact your local authority. Contact details are included at the bottom of EHC Hub notification emails.

Once your username and password have been entered correctly, the following page will be displayed:



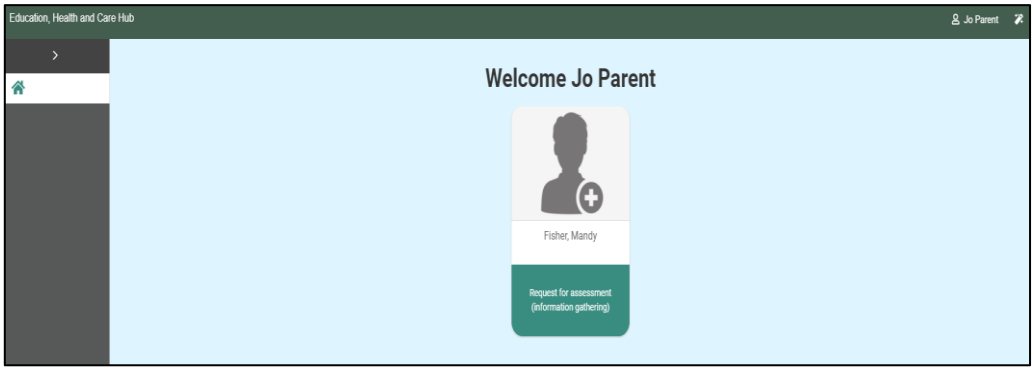
This is a second level of security to make sure only you can access the request details on the EHC Hub. This can be done with an authentication app on your smart phone, or using SMS text messages, whichever you prefer.

If you select an authentication app, this app will provide you with a 6-digit code to be entered. If you select Use SMS instead of an app, the 6-digit code will be sent to your mobile via a text message, and this can be entered on screen.

App Authentication

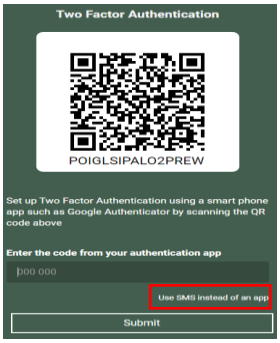
If you already have Google Authentication or an equivalent app on your phone, turn on the camera on your phone and use it to scan the QR code on the screen. You will automatically be directed to your authentication app and it will provide you with a six-digit code.

Enter this code into the field and click on Submit. The welcome page will then be displayed:

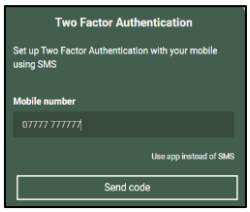


SMS Authentication

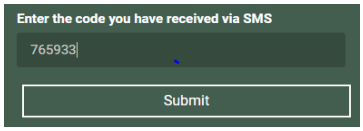
If you would prefer to use SMS instead of an authentication app, click on Use SMS instead of an app:



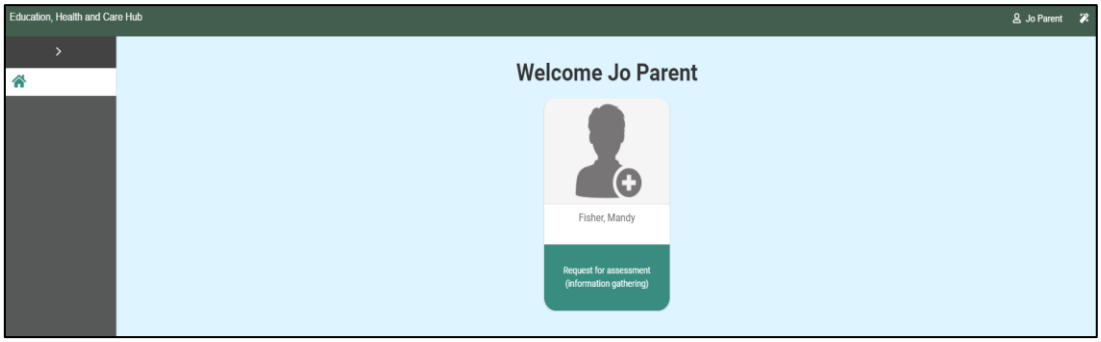
The following page will appear:



Enter the mobile number the text message with the code should be sent to and click on Send code. A field will then be displayed for you to enter the code sent to your mobile as text message:



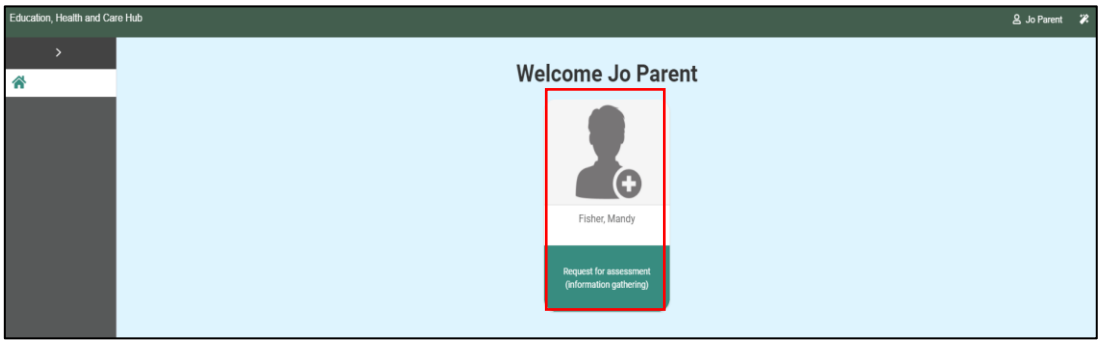
Enter the code and click on Submit. The welcome page will then be displayed:



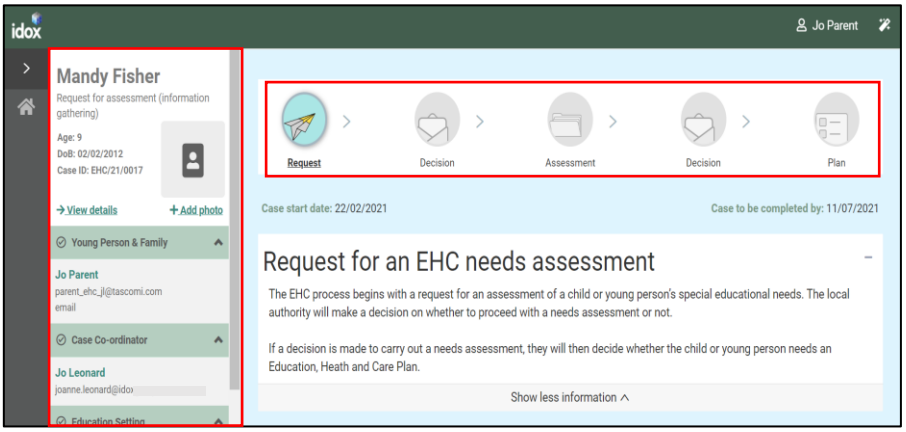
You have now successfully logged into the EHC Hub.

Viewing the Request for Assessment

When you log into the EHC Hub, you will see the icon for the case for the child or young person:



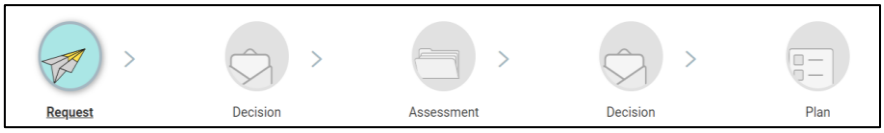
Left click anywhere on this icon to open and display the information in it. The following page will appear:



Status of the Process

The top of the screen will show what stage of the process the EHC plan is currently at.

Request – this means a request for a EHC needs assessment has been made and information is being gathered to decide if a needs assessment should take place:

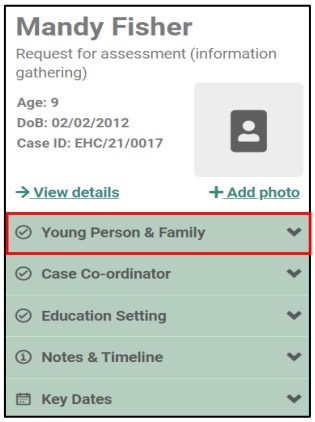


Details of the Case

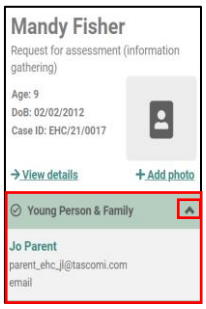
The left-hand side of the screen can be used to access different parts of the case record.

These different sections are Young Person and Family, Case Co-ordinator, Education Setting, Notes & Timeline and Key Dates.

You can expand each section to view information on it by clicking on the green header of the section or on the arrow at the end of each section header:



When you click on the header or the arrow, the display will change like this. Note the direction of the arrow has changed from down to up:



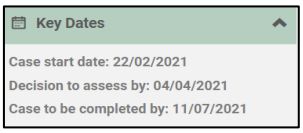
Young Person and Family – This will show the details of the person who made the request

Case co-ordinator – This will show the case co-ordinator responsible for overseeing the process

Education Setting – This will show the details of the current education setting of the child or young person

Notes and Timeline – This page will display all activity on the case in date order, with the most recent at the top. Click on View details to see this information:

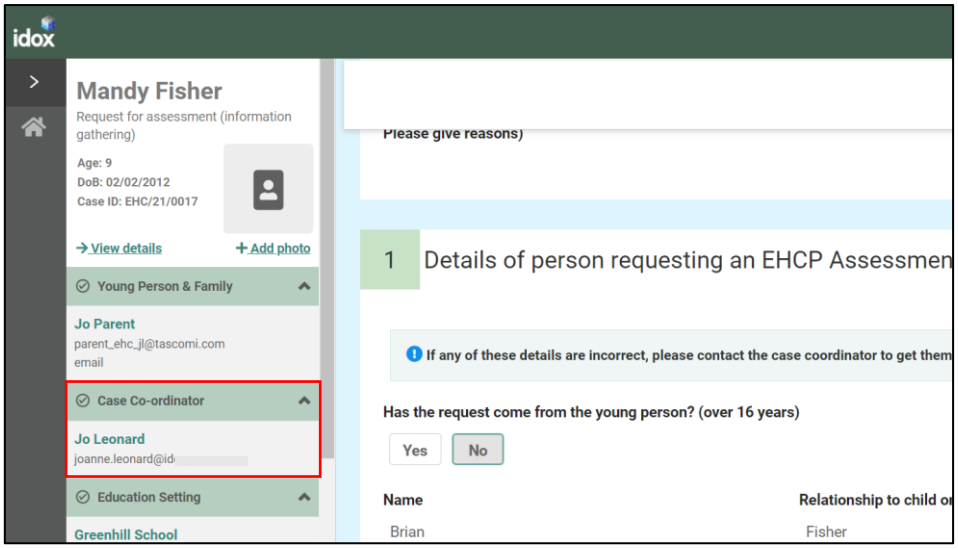
Key Dates – this will display the key dates in the process, based on the statutory date requirements. For example, it could show the start date of the case, when the decision to assess needs to be made and when the case needs to be completed:



How to contribute to a request

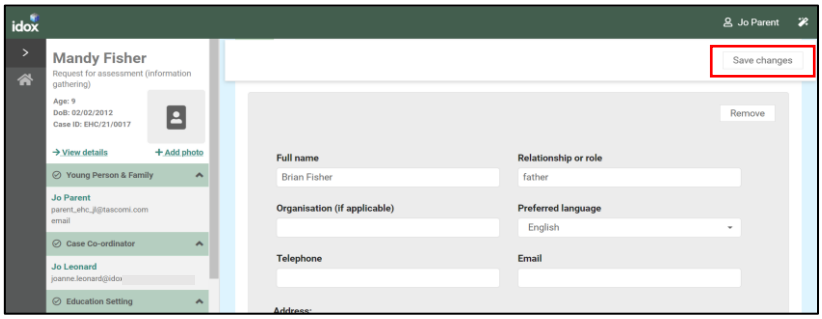
Once the request has been made, there are various things that you can do to contribute to the request. Some of the information can be amended or added to here by you, but some information can only be amended by the case co-ordinator. The details of what you can change and what the case co-ordinator can change can be found below. If you want to change information in an area that can only be amended by the case co-ordinator, you should email the case co-ordinator with the request.

The details of the case co-ordinator, including their email address are displayed on the left-hand side of the screen:

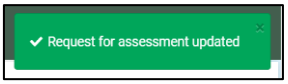


If you do make any changes to those sections that can be amended, you will need to click on Save changes to save those changes.

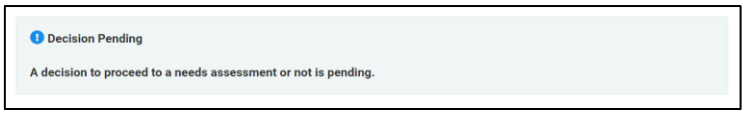
Enter the correct information and click on save changes at the top of the screen:



When you click on save, the information will update and the following message will appear:



Once all of the information for the decision on the assessment has been gathered, a message will appear to say that the decision is pending:



Once this message appears, it will not be possible to amend the request.

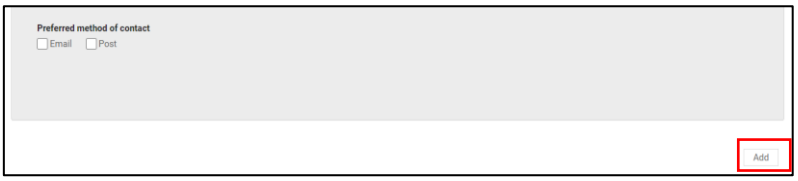
Sections of the Request

Consent - If you created the original request, you will have consented to the gathering and sharing of information, as well as indicating any limitations on this. If you wish to change your consent in any way, you will need to contact the case co-ordinator. Click here for details on how to find out the contact information for your case co-ordinator. If the request was created by someone else, they should have already sought your consent and indicated that in this space. Click here for more details on consent

Details of person requesting an EHCP Assessment - If any of these details are incorrect, you will need to contact the case co-ordinator to get them updated. Click here for details on how to find out the contact information for your case co-ordinator.

Child or young person's details - If any of these details are incorrect, you will need to contact the case co-ordinator to get them updated. Click here for details on how to find out the contact information for your case co-ordinator.

Child or young person's main contacts - These details can be amended and further contacts can be added. To add a further contact, click on Add. Complete the details as required and click on Save Changes. Click here for more details on adding a main contact:



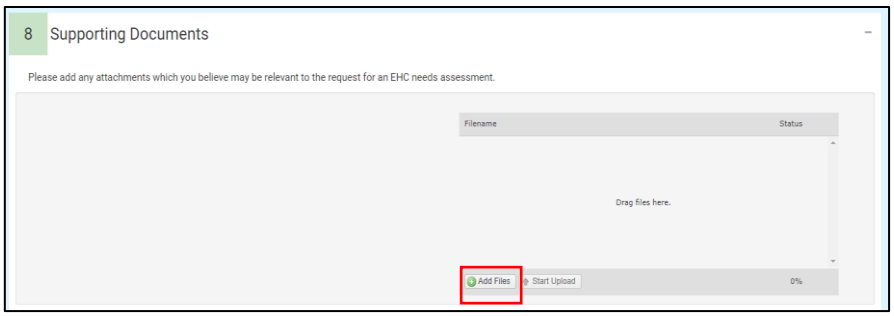
Details of the child or young person's current education settings(s) - If any of these details are incorrect, you will need to contact the case co-ordinator to get them updated. Click here for details on how to find out the contact information for your case co-ordinator.

Details of Previous Settings - If the child or young person has attended a previous educational setting within the last 5 years, information can be added here. To add another education setting, click on Yes and the fields will appear allowing you to enter the details of the education setting. Click here for details on how to add an education setting.

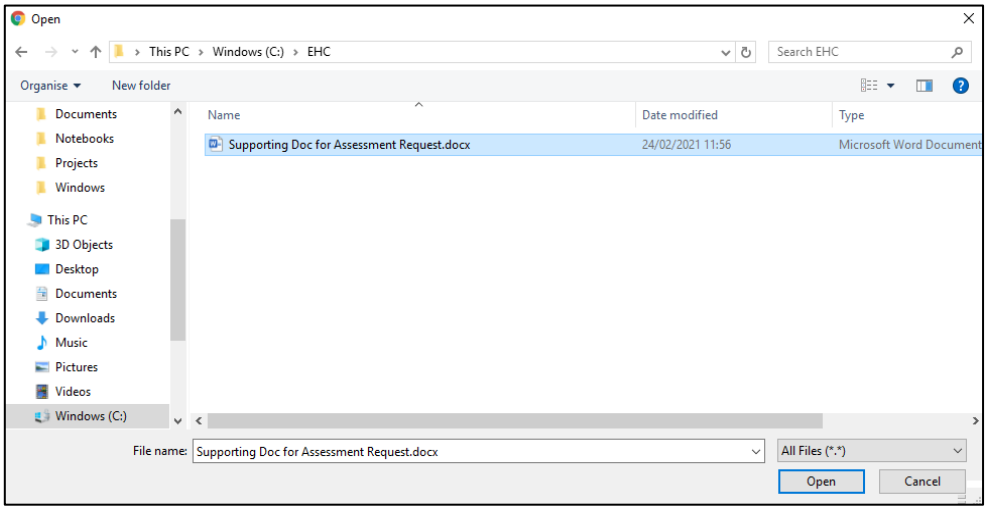
Important information about the child or young person - Any information entered when the original request for assessment was made will be displayed here but can be amended or added to here. Click here for more details on the Important Information section.

Identified Special Educational Needs (SEN) - This section will be completed by the School and the Special Educational Needs Co-ordinator.

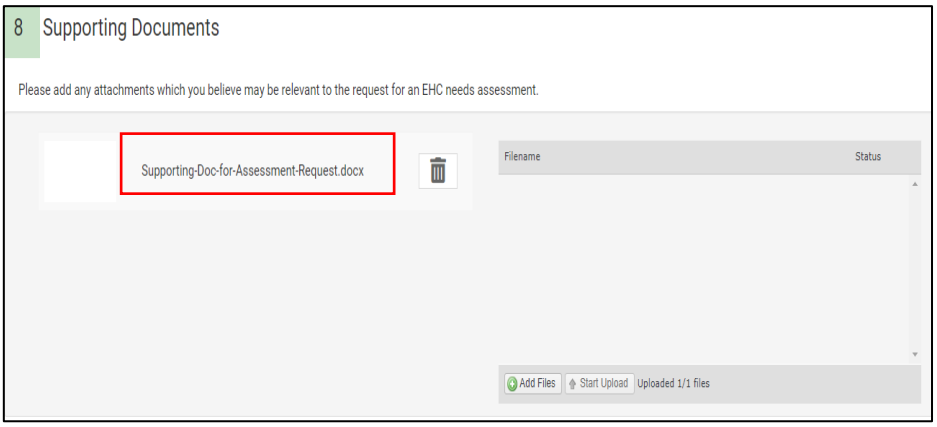
Supporting Documents -If you want to add any relevant supporting documents, click on the Add Files button:



You will then need to navigate to the file wherever you have it saved on your PC:



Click on Open and the file will be uploaded. The uploaded file will be displayed:



How to contribute to an assessment

When the decision has been made as to if an EHC needs assessment for a child or young person will be carried out, you will receive an email telling you this and asking you to access the hub to view the details. The email will look something like this:

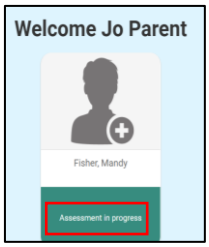
Dear Jo Parent,

Following the request for an EHC needs assessment, a decision has been made about the next stage of the process. To view the decision details, please click on the link below and sign in to your account.

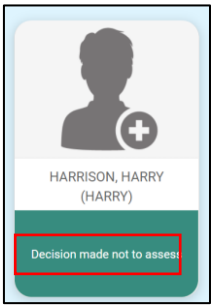
The case reference is EHC/21/0017.

Sign in to the EHC Hub

When you sign into the Hub, the welcome screen will look like this, with the status of the case shown below:



Or



If the decision has been taken not to proceed with an EHC Needs Assessment, the reason for the decision will be displayed, and it will be possible to view a letter with details about the decision:

Assessment process under Section 36 (1) of the Children and Families Act 2014

Decision

Not to proceed with an EHC Needs Assessment

Decision published date

07 September 2021

Letter

Download

Reason for decision

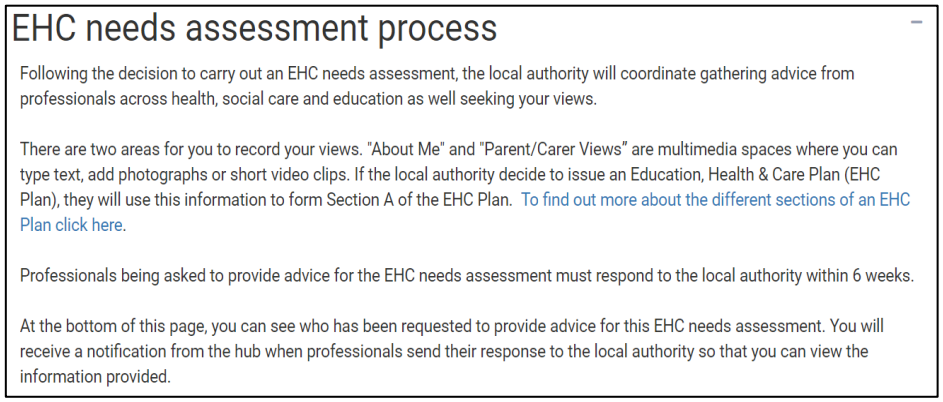
THIS IS THE REASON FOR THE DECISION

The Parent, Carer or Guardian has the right to appeal this decision.

They must register their appeal with the Tribunal within two months of this letter.

To view the letter, click on Download and click on the file in the bottom left hand corner of the screen

If the decision has been taken to proceed with an EHC needs assessment, when you click on the Assessment, you will be provided with information about the EHC needs assessment process, including a link to a website that will provide more information about the different sections of the Plan:


EHC needs assessment process

Following the decision to carry out an EHC needs assessment, the local authority will coordinate gathering advice from professionals across health, social care and education as well seeking your views.

There are two areas for you to record your views. "About Me" and "Parent/Carer Views" are multimedia spaces where you can type text, add photographs or short video clips. If the local authority decide to issue an Education, Health & Care Plan (EHC Plan), they will use this information to form Section A of the EHC Plan. To find out more about the different sections of an EHC Plan click here.

Professionals being asked to provide advice for the EHC needs assessment must respond to the local authority within 6 weeks.

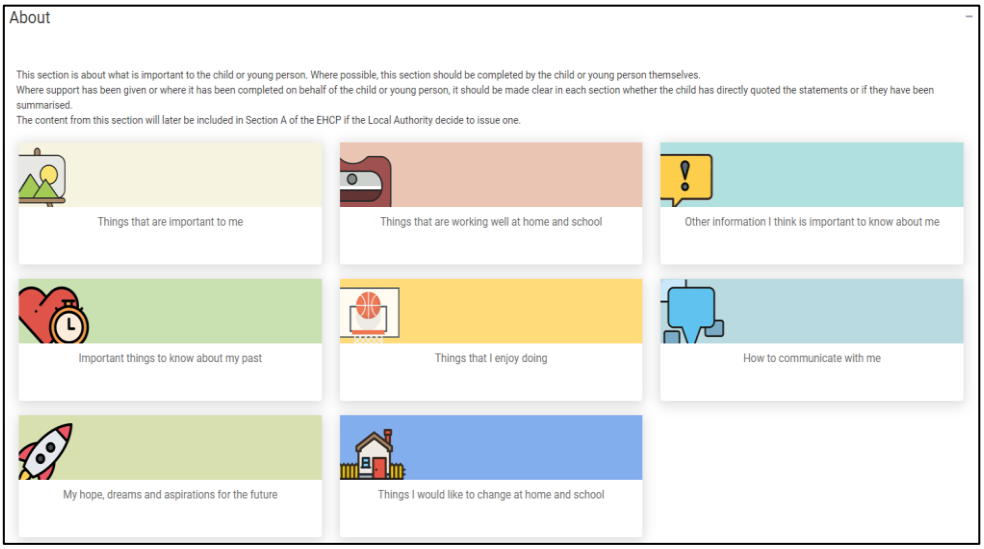
At the bottom of this page, you can see who has been requested to provide advice for this EHC needs assessment. You will receive a notification from the hub when professionals send their response to the local authority so that you can view the information provided.

There are two sections for you to contribute to the EHC needs assessment. These are About: and Parent Carer views.

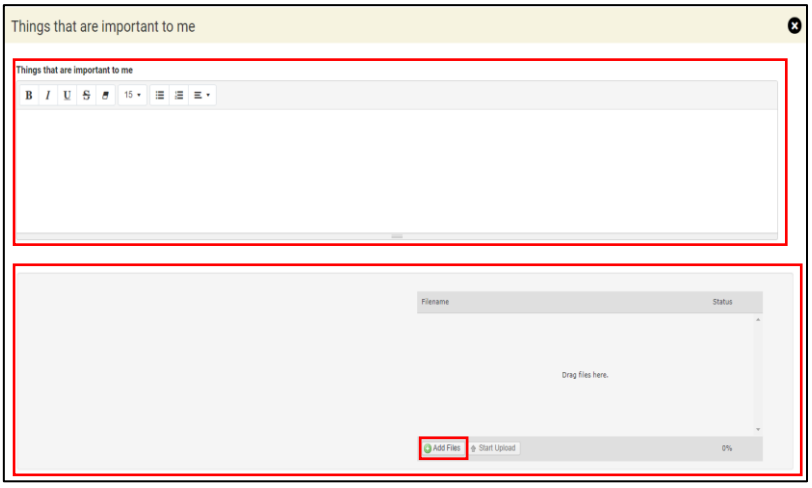
About

The section is all about what is important to the child or young person. If it is possible, the information should be completed by the child or young person the assessment is for. If this child cannot complete it independently, and it is being filled in by someone else, it is important that this indicated in each section. If the local authority decide to issue a EHC Plan after the assessment is complete, content from these sections will be included.

There are 8 sections to be completed. Left click on each section to enter information:

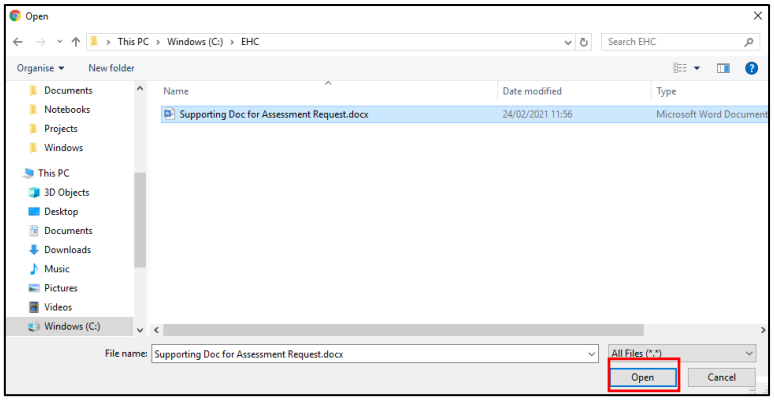


When you click on one of the options, a page will be displayed allowing information to be typed in:

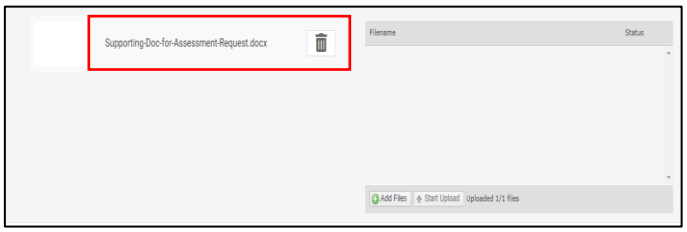


Click here for more information on using free text fields:

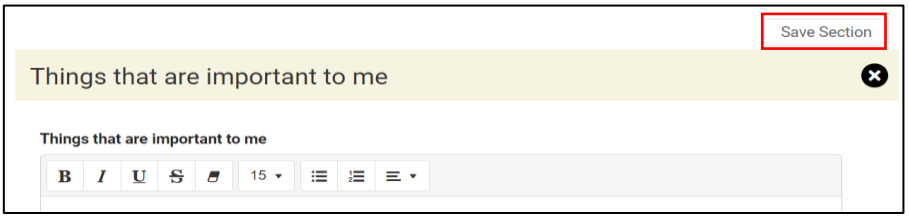
Underneath, there is also a section to add files if you wish. These could be files like documents, photos or short video clips. Click on the Add Files button and navigate to the file wherever you have it saved on your device:



Click on Open and the file will be uploaded. The uploaded file will be displayed:



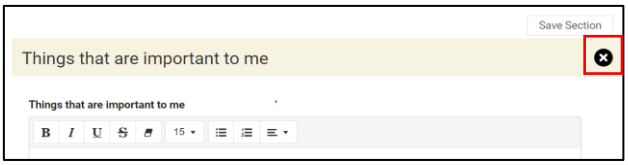
When you have completed the information, you need to save it before moving on to the next section. Click on Save Section to save the information:



Once you have completed the information and saved it, you can access the next section. At the bottom of the section being completed, below the upload file area, there will be an arrow to the next section to be completed:

This will change depending on where you are in the record:

Alternatively, you can click on X and you will be taken back to the main page to choose which section you want to complete next:

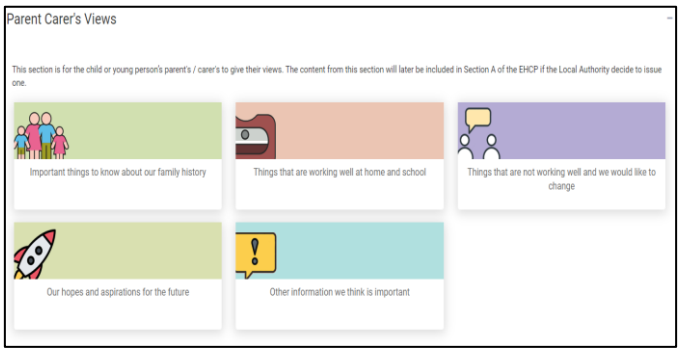


The sections to be completed are:

- Things that are important to me
- Things that are working well at home and school
- Other information I think is important to know about me
- Important things to know about my past
- Things that I enjoy doing
- How to communicate with me
- My hopes, dreams and aspirations for the future
- Things I would like to change at home and school

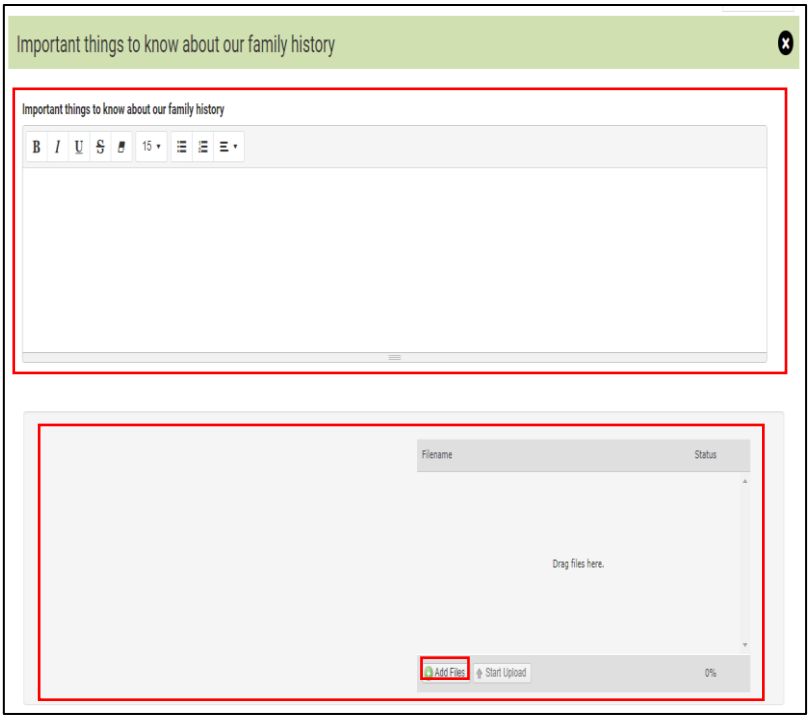
Parent Carer's Views

This section is for the Parent or Carer of the child or young person to give their views:



There are 5 sections to be completed.

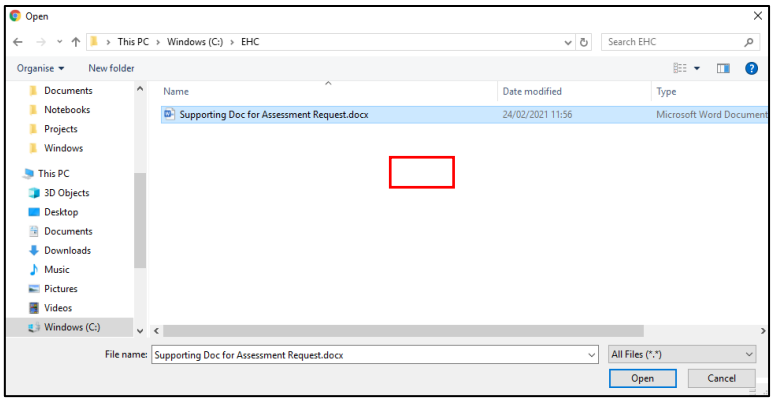
When you click on one of the options, a page will be displayed allowing information to be typed in:



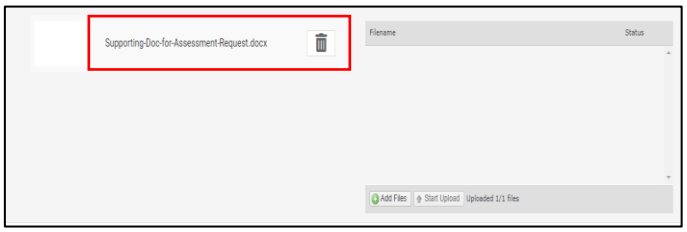
Click here for more information on using free text fields:

Underneath, there is also a section add files if you wish. These could be files like documents, photos or short video clips. Click on the Add Files button:

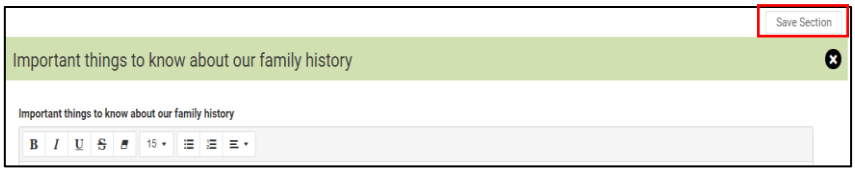
You will then need to navigate to the file wherever you have it saved on your Device:



Click on Open and the file will be uploaded. The uploaded file will be displayed:



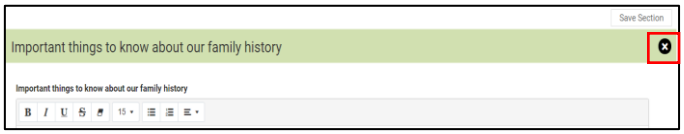
When you have completed the information, you need to save it before moving on to the next section. Click on Save Section to save the information:



Once you have completed the information and saved it, you can access the next section. At the bottom of the section being completed, below the upload file area, there will be an arrow to the next section to be completed:

This will change depending on where you are in the record:

Alternatively, you can click on X and you will be taken back to the main page to choose which section you want to complete next:



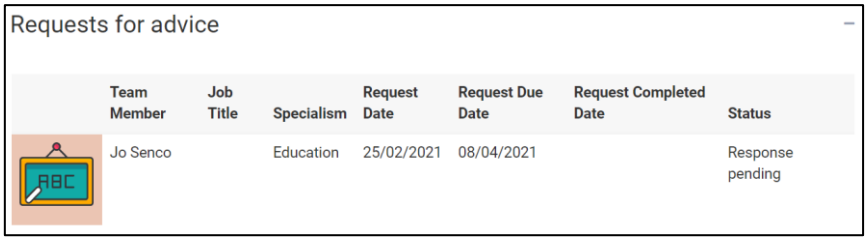
The sections to be completed are:

- Important things to know about our family history
- Things that are working well at home and school
- Things that are not working well and we would like to change
- Our hopes and aspirations for the future
- Other information we think is important

These are the two areas where you can contribute to the assessment.

Requests for advice

There is also a section showing who else has been asked to provide information for the assessment. When the professionals send their response to the local authority, you will get a notification email from the hub so that you can view the information provided:

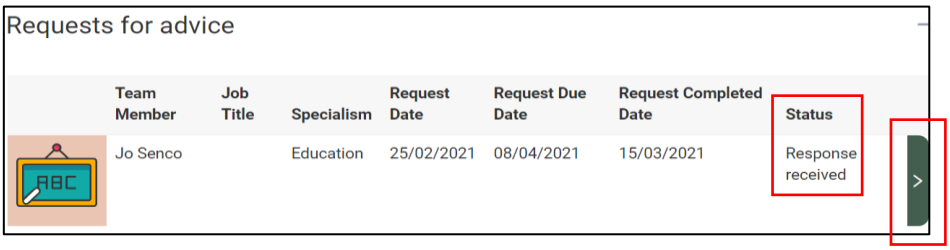


There are a number of people that might be asked to contribute to the assessment. These include:

- Education professionals for education advice
- Health Care professionals for medical advice
- Education psychologists for psychological advice
- Social Care advice
- Any other person the local authority thinks is appropriate.

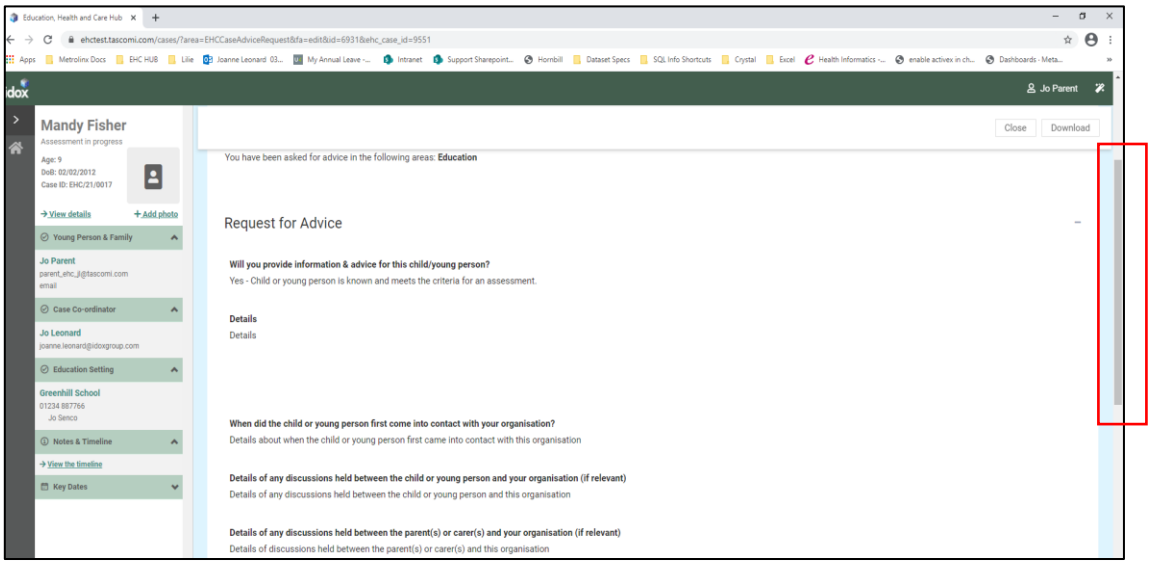
It is also possible for you to ask the case co-ordinator to request advice from a particular person if the local authority hasn't done so already. A parent, carer, guardian or young person can ask the local authority to request advice from anyone working in education, health or social care as long as it is reasonable to do so. The case co-ordinator's contact details are shown in the case sidebar.

Once the response to the request for advice has been received, the status will change to show this:

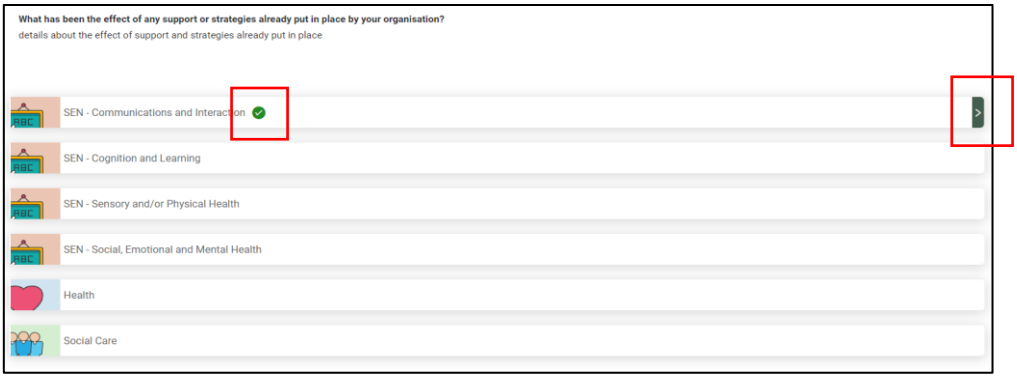


To view the response, click on the Green right pointing arrow and the Request for advice screen will be displayed, with the information entered by the person who the advice was requested from.

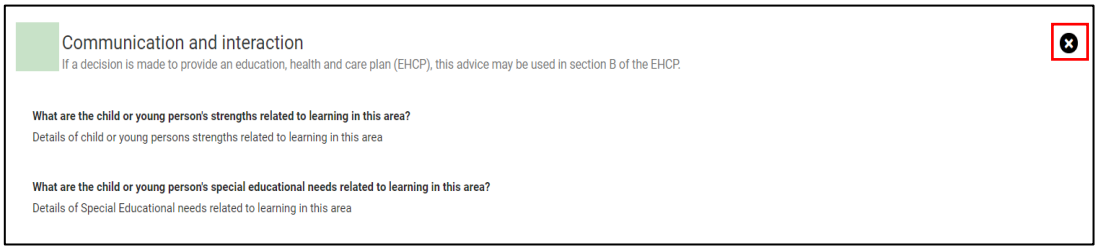
You can scroll up and down the screen to view the information entered, using the scroll bar on the right:



If further sections have been completed, they will be displayed with a green tick and a green arrow on the right:

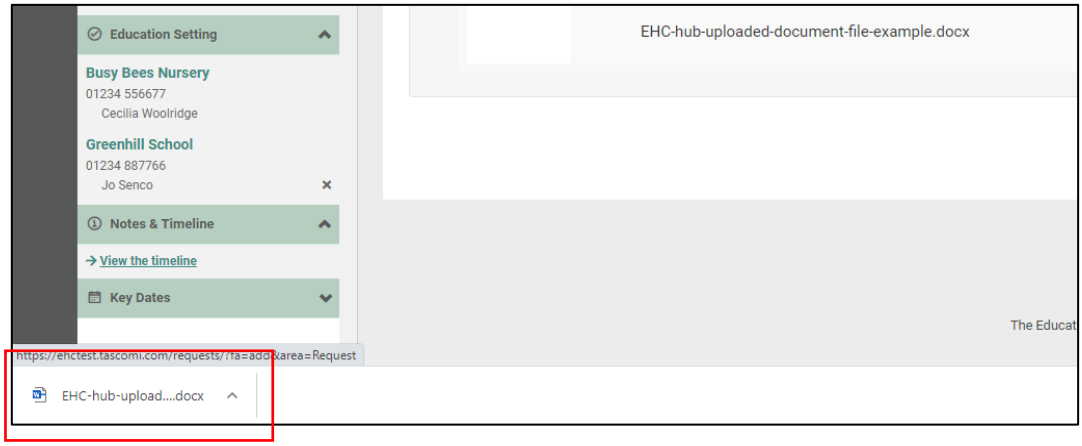


Click on the green arrow to view the information entered:



Click on the X to close the section and view another section. There is also a section displaying any documents that have been uploaded:

To view these documents, click on the white square and the document will show as a download in the bottom left-hand corner of the screen (the actual location of the downloaded document will be dependent on the web browser that you are using):



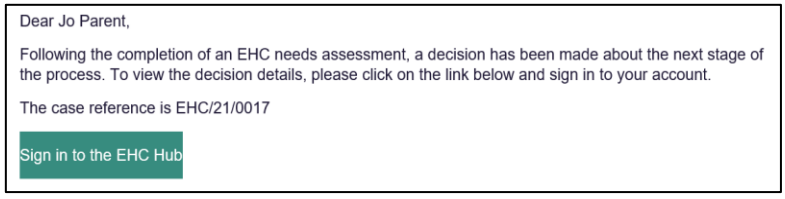
Left click on this to open it and view the information.

Once all of the information has been gathered together, the assessment can take place and the decision made about if an EHC Plan will be issued. A decision to issue a plan must be made within

16 weeks of the case start date. To view important dates, click on Key Dates at the bottom of the menu bar on the left:

The case start date is the date the request for an EHC needs assessment was made. The dates will show when something happened or when it is due to happen.

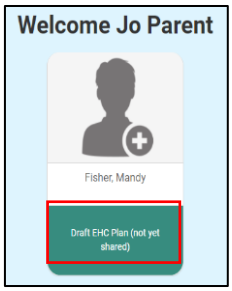
When the decision has been made to issue a plan or not, you will receive an email telling you that there is new information on the Hub for you to view. The email will look something like this:



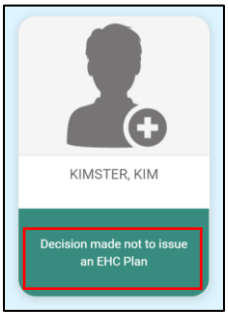
You will need to sign into the Hub to view the result of the decision.

If a decision has been made to issue an EHC Plan, a draft plan will be published as soon as possible. You will be asked to comment on this draft plan within 15 calendar days and when these comments have been submitted, the draft plan can be updated before a final plan is made.

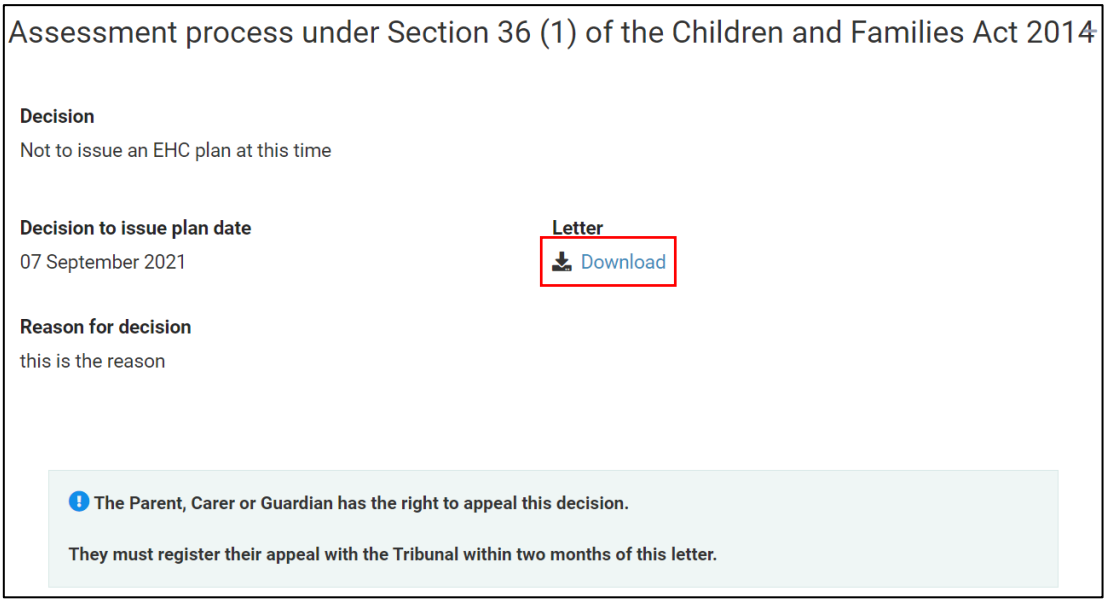
When you log in to the Hub, the status will show like this:



Or



If the decision has been made to not issue an EHC Plan, the following information will be displayed:



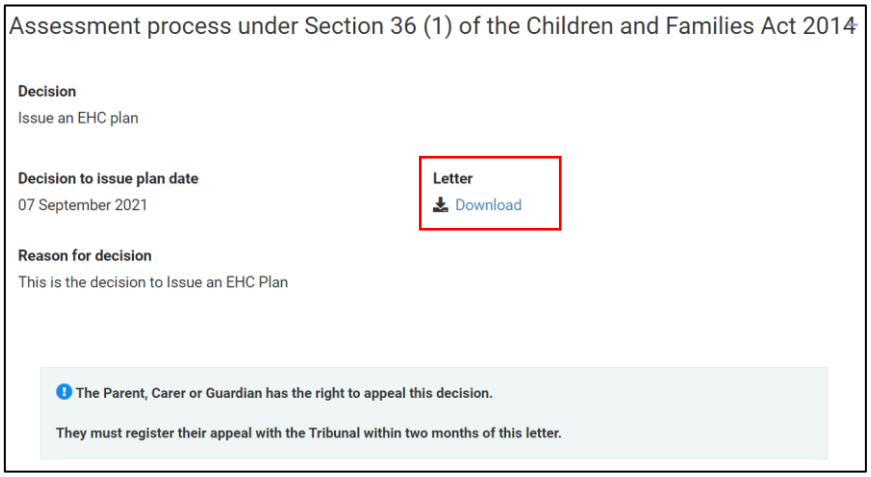
This will include the reason for the decision and a letter that can be downloaded with more information about the decision.

To view this letter, click on Download.

If the decision has been made to issue a plan, the status will show that a decision has been made to proceed to a plan:

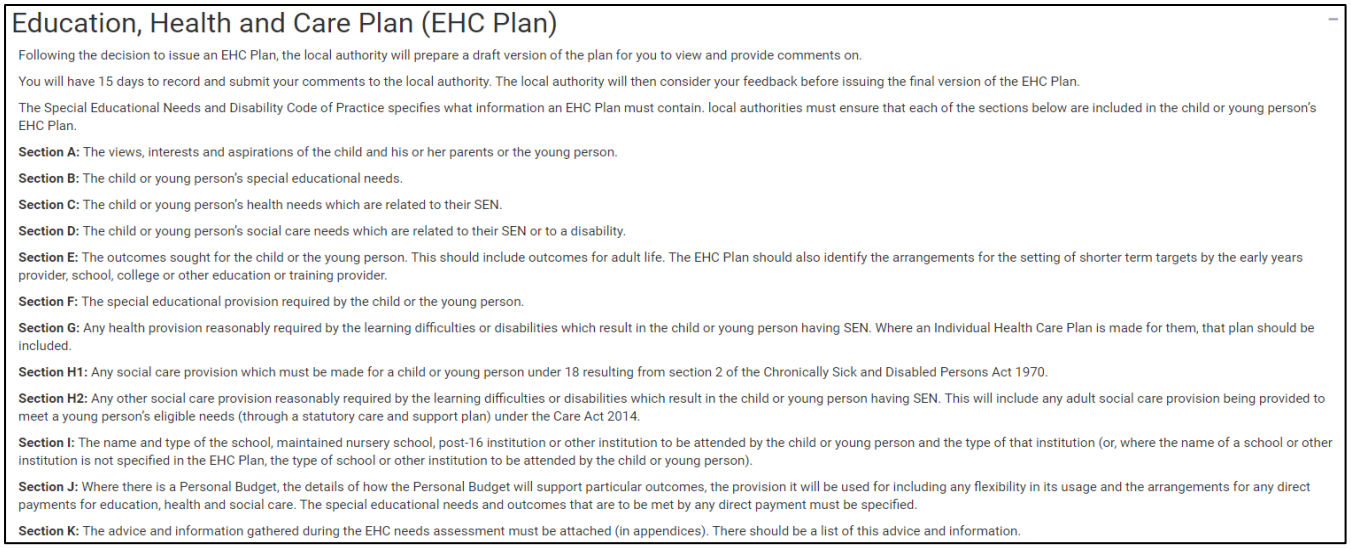
To view details and download the letter about the decision, click on Decision:

The information below will be displayed:



For more information about the decision, click on Download to download the letter.

Click on Plan. The main screen will show some information about the next part of the process:



Education, Health and Care Plan (EHC Plan)

Following the decision to issue an EHC Plan, the local authority will prepare a draft version of the plan for you to view and provide comments on.

You will have 15 days to record and submit your comments to the local authority. The local authority will then consider your feedback before issuing the final version of the EHC Plan.

The Special Educational Needs and Disability Code of Practice specifies what information an EHC Plan must contain. local authorities must ensure that each of the sections below are included in the child or young person's EHC Plan.

Section A: The views, interests and aspirations of the child and his or her parents or the young person.

Section B: The child or young person's special educational needs.

Section C: The child or young person's health needs which are related to their SEN.

Section D: The child or young person's social care needs which are related to their SEN or to a disability.

Section E: The outcomes sought for the child or the young person. This should include outcomes for adult life. The EHC Plan should also identify the arrangements for the setting of shorter term targets by the early years provider, school, college or other education or training provider.

Section F: The special educational provision required by the child or the young person.

Section G: Any health provision reasonably required by the learning difficulties or disabilities which result in the child or young person having SEN. Where an Individual Health Care Plan is made for them, that plan should be included.

Section H1: Any social care provision which must be made for a child or young person under 18 resulting from section 2 of the Chronically Sick and Disabled Persons Act 1970.

Section H2: Any other social care provision reasonably required by the learning difficulties or disabilities which result in the child or young person having SEN. This will include any adult social care provision being provided to meet a young person's eligible needs (through a statutory care and support plan) under the Care Act 2014.

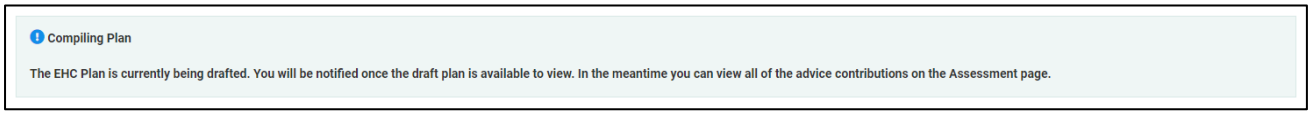
Section I: The name and type of the school, maintained nursery school, post-16 institution or other institution to be attended by the child or young person and the type of that institution (or, where the name of a school or other institution is not specified in the EHC Plan, the type of school or other institution to be attended by the child or young person).

Section J: Where there is a Personal Budget, the details of how the Personal Budget will support particular outcomes, the provision it will be used for including any flexibility in its usage and the arrangements for any direct payments for education, health and social care. The special educational needs and outcomes that are to be met by any direct payment must be specified.

Section K: The advice and information gathered during the EHC needs assessment must be attached (in appendices). There should be a list of this advice and information.

This details what information the plan must contain.

Underneath, it will show if the plan has been drafted yet. If it is still being drafted, this will be displayed:

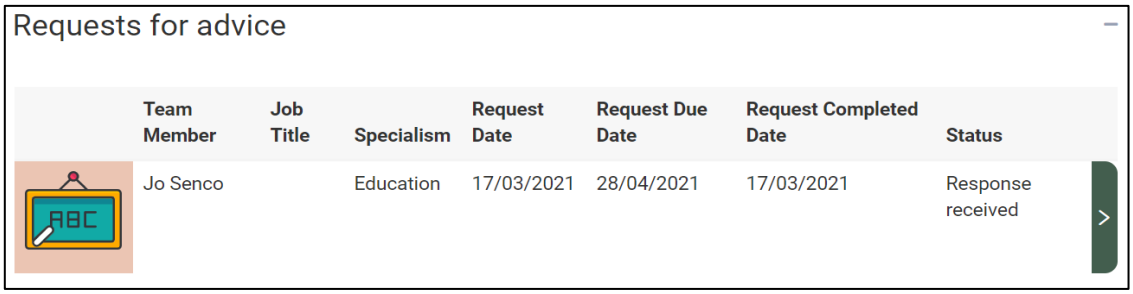


Compiling Plan

The EHC Plan is currently being drafted. You will be notified once the draft plan is available to view. In the meantime you can view all of the advice contributions on the Assessment page.

If you haven't already read the advice contributions that might go into the plan, click on Assessment at the top of the screen to view the Assessment page:

At the bottom of this screen there is the Requests for Advice section:



Requests for advice

	Team Member	Job Title	Specialism	Request Date	Request Due Date	Request Completed Date	Status
	Jo Senco		Education	17/03/2021	28/04/2021	17/03/2021	Response received

See here for more information on Requests for Advice.

How to Comment on a Draft Plan

When the draft plan is ready, it will be shared. When it has been shared, you will get an email to say that it is available to view:

Dear Jo Parent,

A draft Education, Health and Care Plan (EHC Plan) is available to view on the EHC Hub. To view the draft EHC Plan, please click on the link below and sign in to your account.

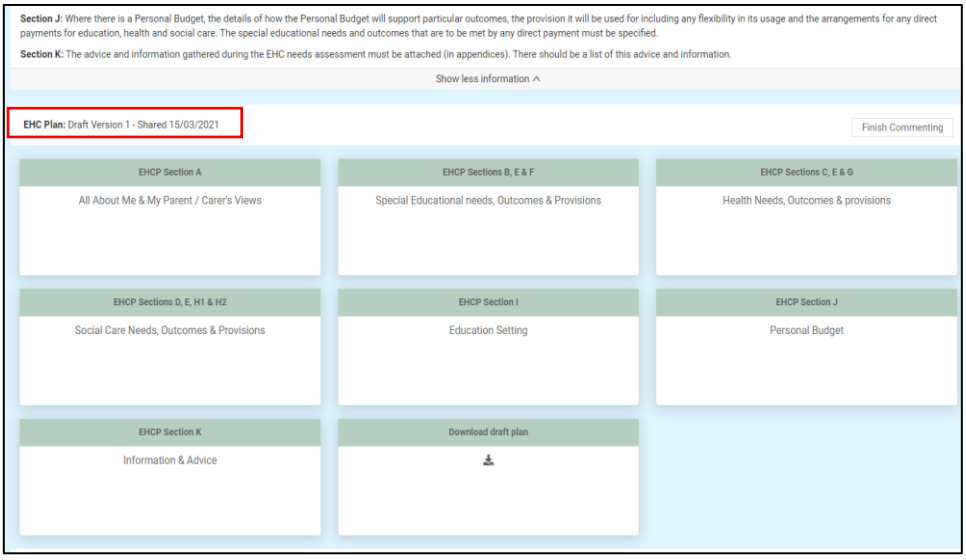
The case reference is EHC/21/0028

You have 15 calendar days to consider the plan and send us your views/ comments. We will then consider your comments before issuing the final version of the EHC Plan.

Sign in to the EHC Hub

The draft plan will show the advice that has been submitted by any of the professionals who were asked for advice as well as the planned outcomes and provisions.

If the draft plan is ready to be viewed, the screen underneath the information section will look like this, showing when the Draft was shared:

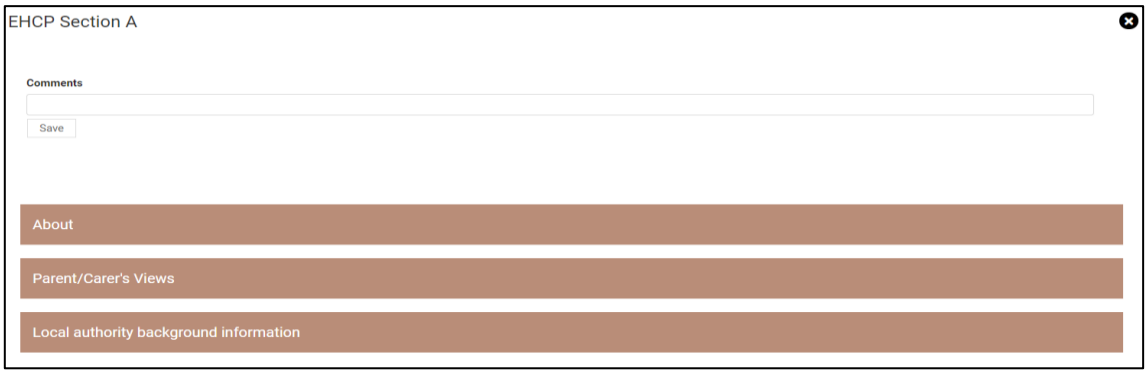


Each of the sections make up part of the Plan. To view more information on each section, left click on that section.

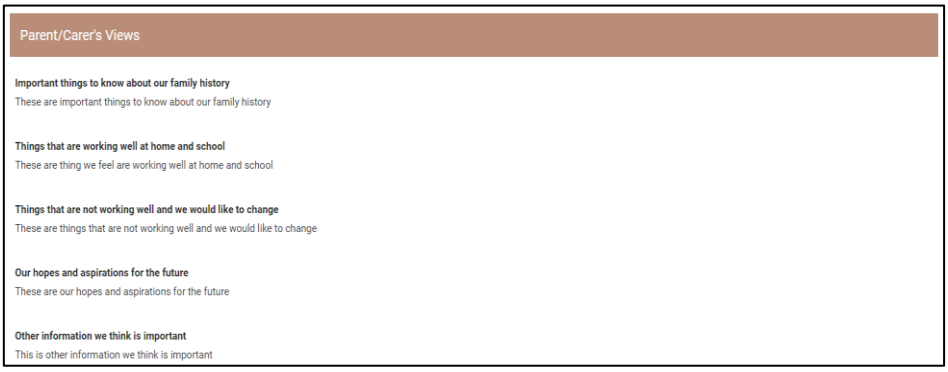
You will be able to comment on the whole section, any parts of the section and any outcomes or provisions in that section.

Each section may have multiple parts to it.

When you click on a EHCP section, the different parts of that section will be displayed with a brown heading:



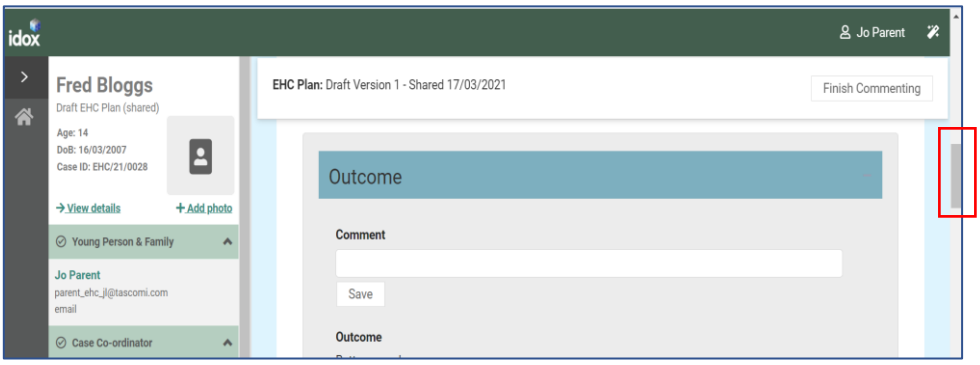
Left click on each of the part headings to view any information that has been entered



If a section is not applicable (for example, the child or young person does not have extra Health Needs) it will look like this:

(It is still possible to add a comment to this section if required.)

It is important to scroll up and down the screen to make sure you can see all the information that has been added to the plan. Left click on the scroll bar on the right-hand side of the screen to move up and down on the screen.

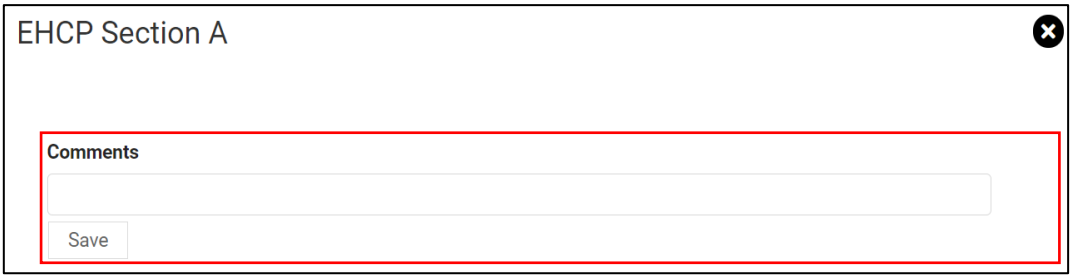


Click on the X to return to the main screen:

Adding a comment to a Section

To add a comment to section, left click on that section

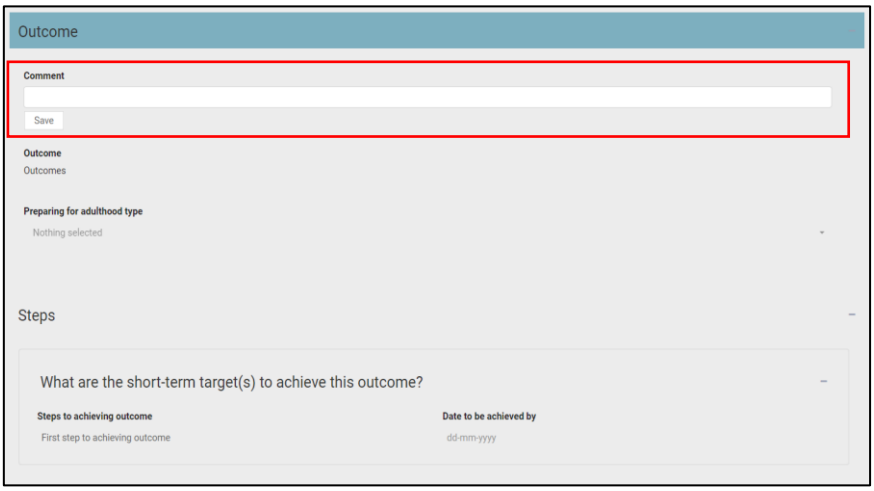
Each section will have a comments box for you to enter your comments on the information in the plan:



When you have entered your comment, click on Save to save the comment. This will be a draft and no one will see them until you click on Finish Commenting to submit your comments.

Adding a comment to an Outcome or Provision in a Section

Scroll to that part of the section. To enter a comment on the outcomes and provisions of any part of the plan, that section will display a comment field for you to complete:



You can type as much information as required in this field. It will all be included, even if it can't be viewed in this field in one go. When you have entered the comment, click on Save to save your comment.

Then click on the X to return to the main screen.

EHCP Section A – Left click on this to display the previous information entered by the Parent/Carer and /or young person during the contribution to the assessment stage. See here for more information on this section.

This has three parts:

- About
- Parent/Carer's Views
- Local authority background information

EHCP Sections B, E and F – Left click on this to display information about Special Educational needs, Outcomes and Provisions.

This has four parts:

- Cognition and Learning
- Communication and Interaction
- Social, Emotional and Mental Health
- Sensory and/or Physical needs

You can enter comments here about the planned outcome and the planned provision.

EHCP Sections C, E and G – Left click on this to display information about Health Needs, Outcomes and Provisions which relate to the special educational needs of the child or young person.

You can enter comments here about the planned outcome and the planned provision.

EHCP Sections D,E,H1 and H2 – Left click on this to display information about Social Care Needs, Outcomes and Provisions which relate to the special educational needs of the child or young person.

You can enter comments here about the planned outcome and planned provision.

EHCP Section I – Left click on this to display information about the Education Setting. This information is not populated at this draft plan stage. The settings will be recorded in the Final EHC Plan. You can enter information in the comment box as part of the consultation to name your preferred education setting.

EHCP Section J – Left click on this to display any information about the personal budget. This has two parts:

- Personal Budget
- Annual Cost of Support

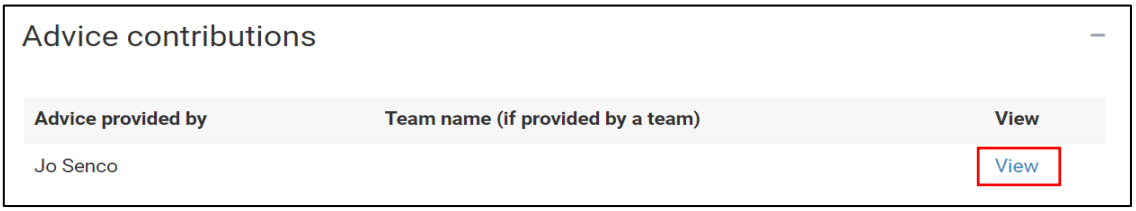
Contact the case co-ordinator if you would like to discuss personal budgets or are not sure whether this applies.

EHCP Information and Advice – Left click on this to display any information and advice provided by professionals during the assessment process. See here for more information on this.

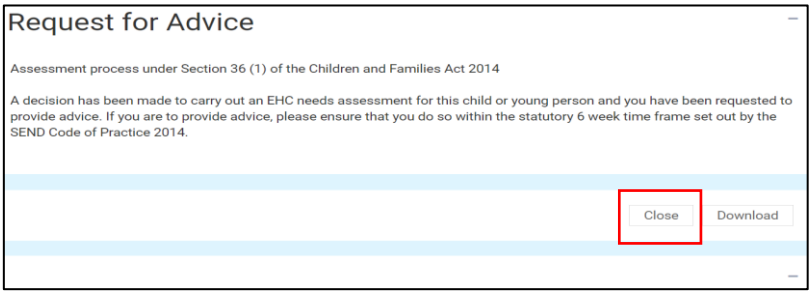
This has 2 parts

- Monitoring and review
- Progress towards outcomes specified in this plan will be monitored by

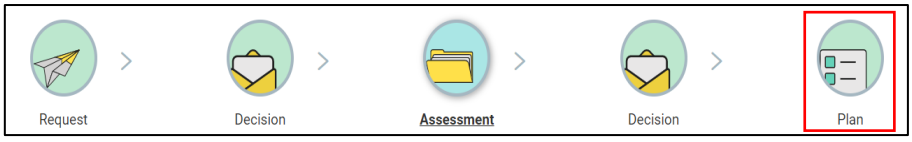
It also has a section on Advice Contributions. To view any advice contributions that have been made, click on view:



You will then be able to view the information. See here for more details on this. When you have finished looking at this information, click on close:

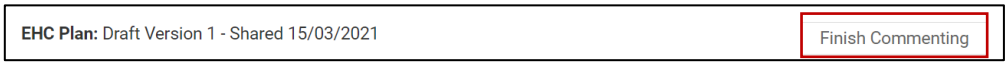


Left click on Plan at the top of the screen to return to the draft plan:



How to finish commenting on a draft plan

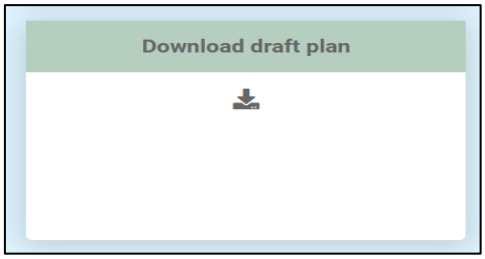
When you have added all of your comments and you are ready to submit them, click on Finish Commenting:



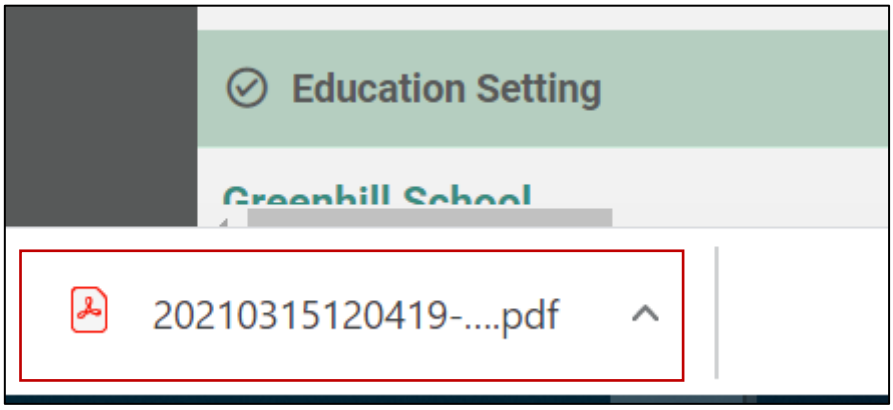
Any comments you add will not be visible to other people until you click on Finish Commenting. At that point they will be added to the plan and other people with access to the case will be able to read them. Even if you have no comments, this will tell the Case Coordinator that you have finished looking at the document and have no comment to make.

Downloading a Draft Plan

If you wish to download the draft plan as a PDF file. Click on Download Draft Plan:



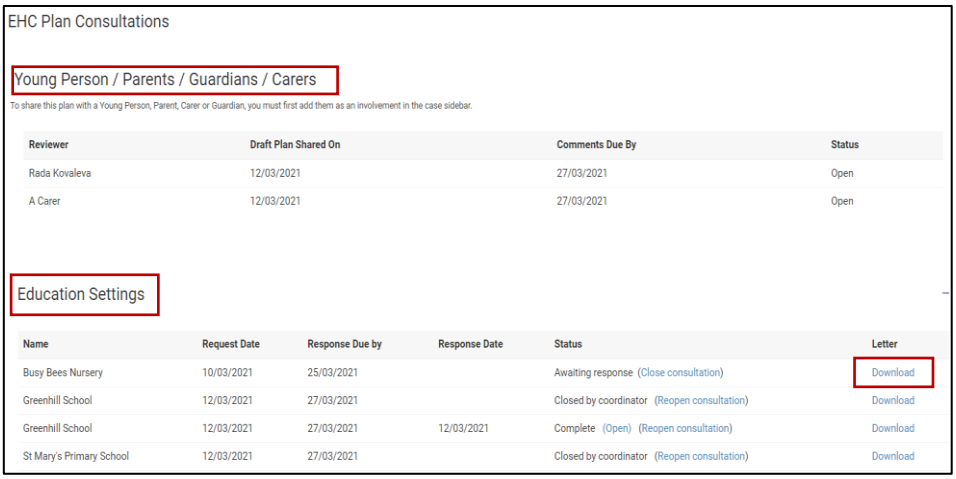
The downloaded plan will then show in the bottom left-hand corner of the screen:



Left click on this to view the contents of the PDF file. This can be saved to your own device, if required.

EHC Plan Consultations

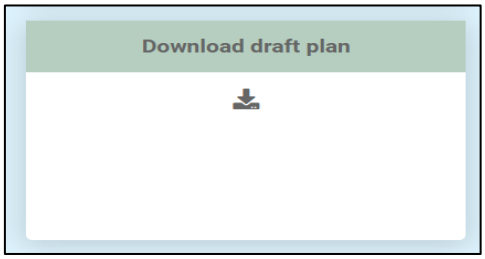
At the bottom of the plan, there will be list of the Parent/Guardians/Carers or young people that have been consulted about this draft plan, as well as Education Settings consultations:



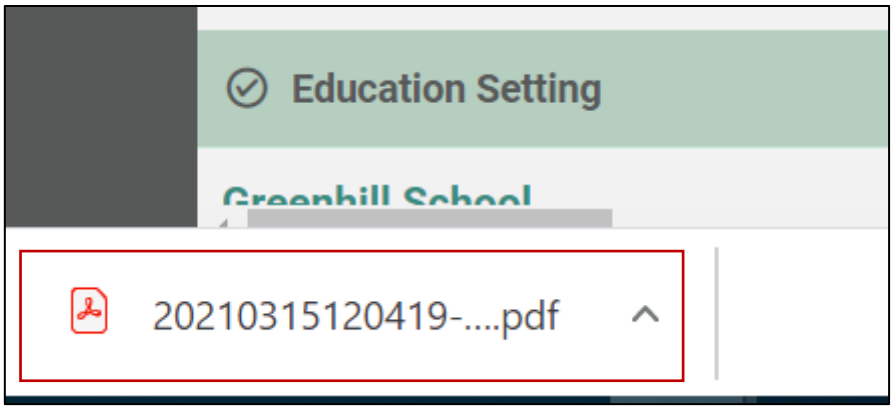
It will list all Parent/Guardians/Carers or young people who have been asked to review the plan, when the draft plan was shared with them and when they need to comment by. It will also have the status of the comments process. If this says Open, then that person is still in the process of adding comments. Once you have click on Finish Commenting (see here for details) the status will change to show Completed:

Reviewer	Draft Plan Shared On	Comments Due By	Status
Jo Parent	15/03/2021	30/03/2021	Completed

Under the educational settings, it will show all educational settings that have been consulted and the status of that consultation. To view the letter the educational setting was sent as part of the consultation, click on Download in the letter column:



The downloaded letter will then show in the bottom left-hand corner of the screen:



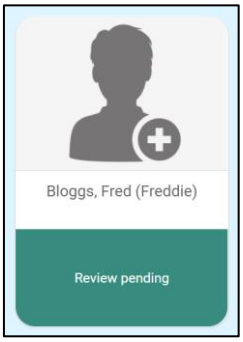
Left click on this to view the contents of the PDF file. This can be saved to your own device, if required.

EHC Plan Review

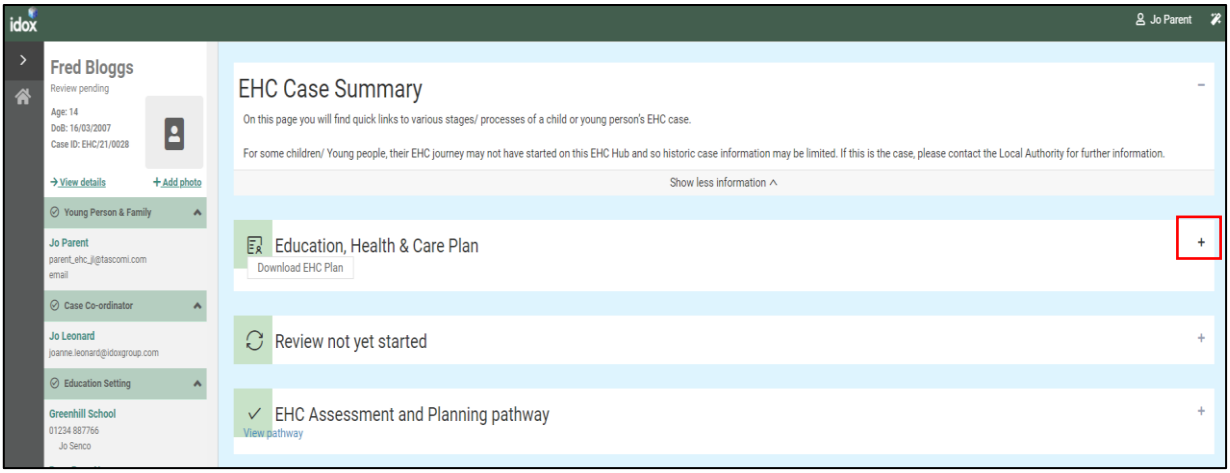
Once a plan has been finalised, it must be reviewed annually. Information about the review date will be displayed when you log into the Hub and view the case.

You will receive an email with the details of the review meeting when it has been arranged. This is usually done by the SENCo within the education setting.

In the meantime, when you log in, the case status will be displayed like this:



When you click on this, you will be taken to the EHC Case Summary page:

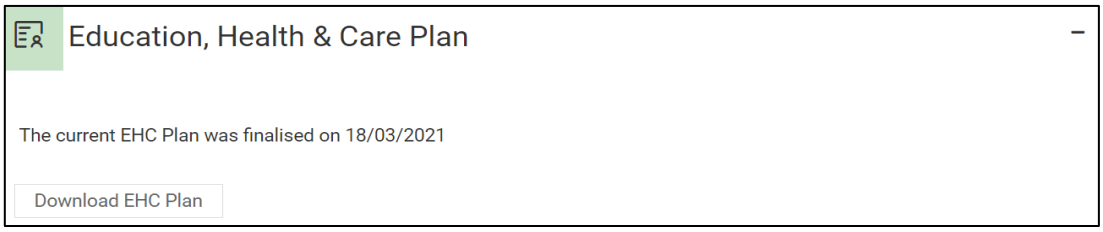


EHC Case Summary Page

This includes sections of information for the history of activity on the EHC Hub.

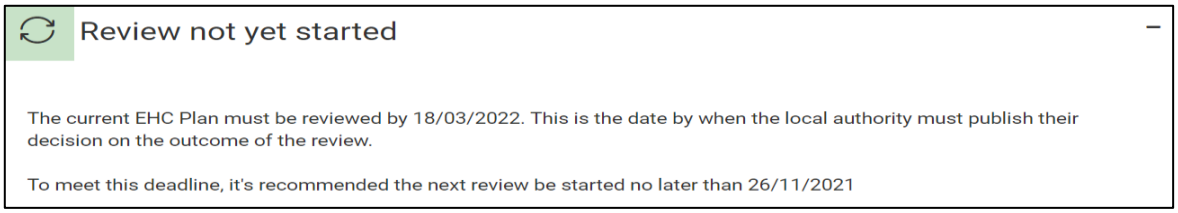
Education, Health and Care Plan

Click on the Plus to open this section:



This will display when the current plan was finalised. You can also download a copy of the plan if required by clicking on the Download EHC Plan button. The download will appear in the bottom left-hand corner of the screen:

Review not yet started

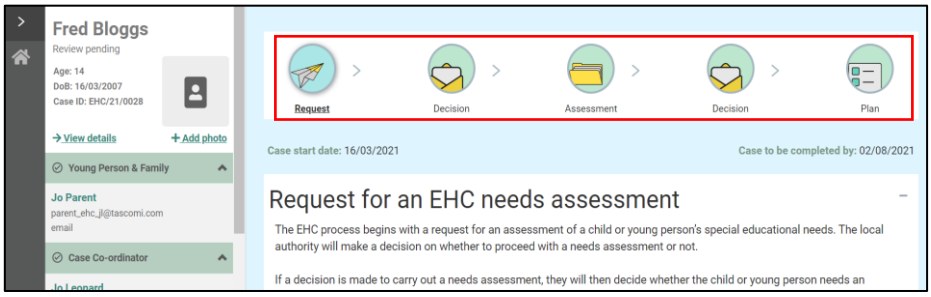


This will tell you when the plan is due to be reviewed.

EHC Assessment and Planning Pathway

This will tell when the assessment and planning pathway was completed. To view the pathway, click on View Pathway.

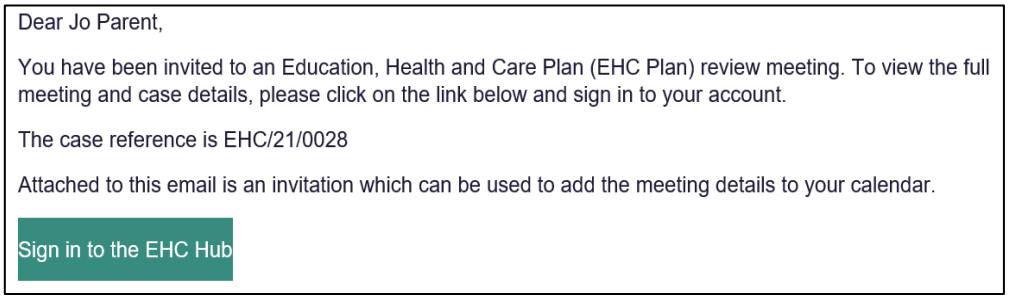
This will take you to the pathway page where you can view the information entered previously on the pathway to the Plan:



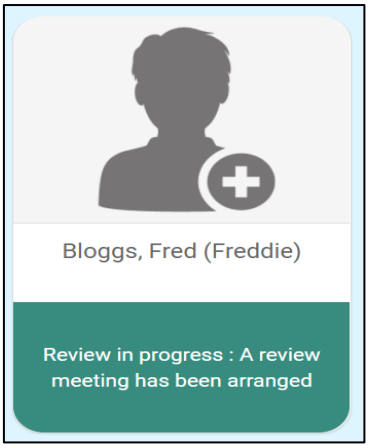
Click on any of the status buttons at the top of the screen to view the information.

EHC Plan Review Meeting

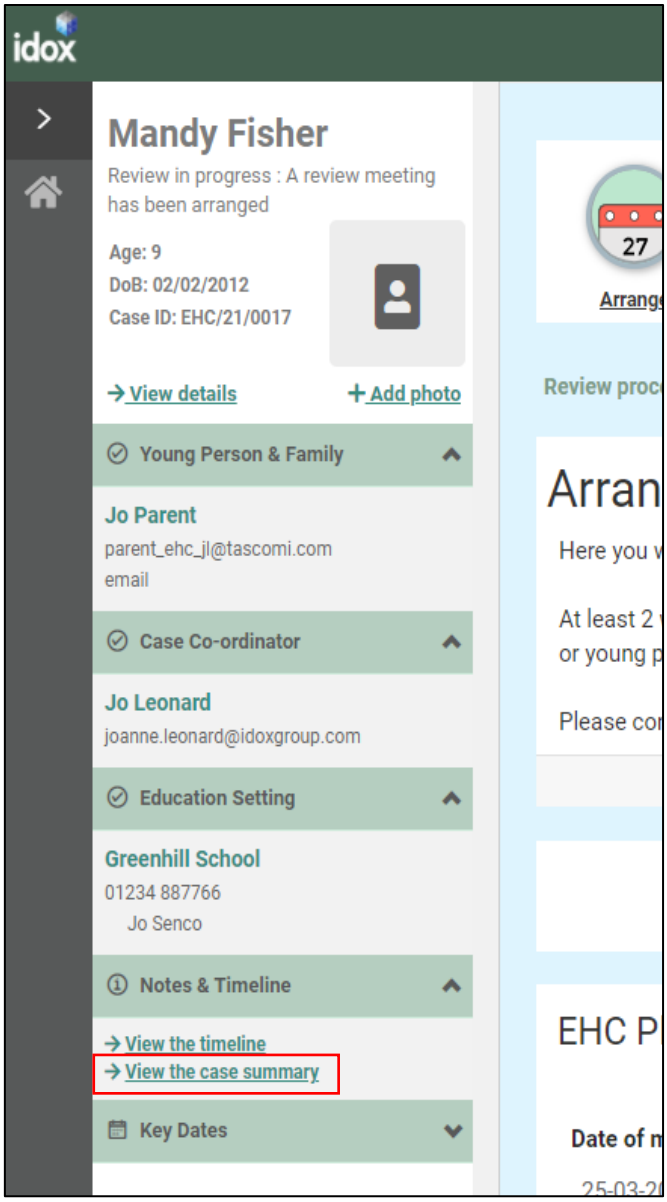
When the review meeting has been arranged, you will receive an email with the details of the date, time and venue for the meeting:



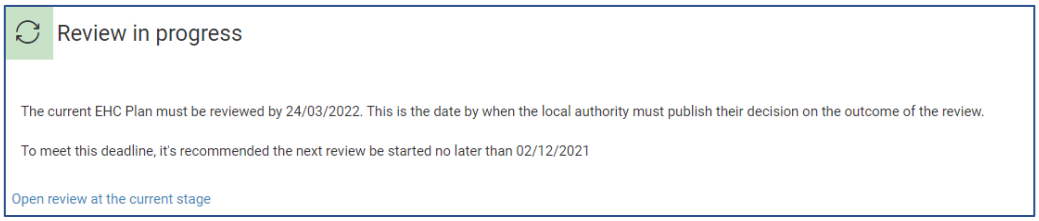
When you have your email, and sign into the HUB, the main screen will look like this:



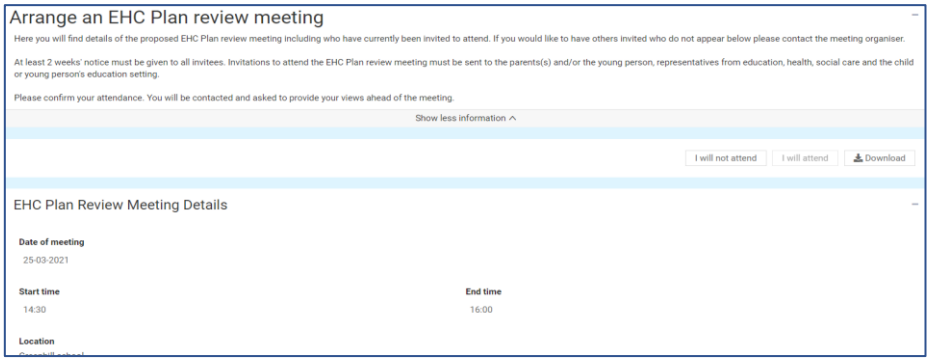
When you click on this, to view the details of the meeting, click on View the case summary on the left-hand side:



In the Review in progress section, click on Open review at the current stage.

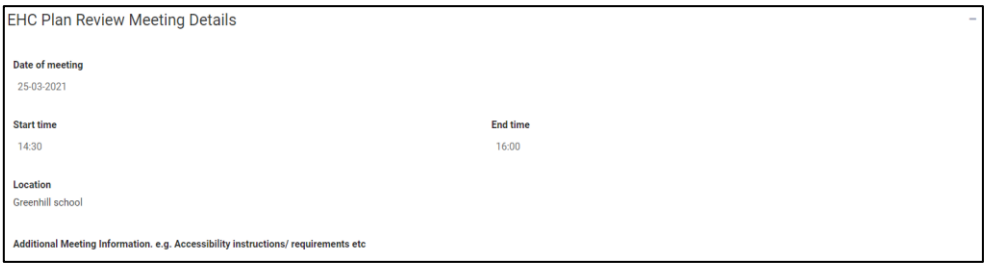


Details of the meeting will be displayed:



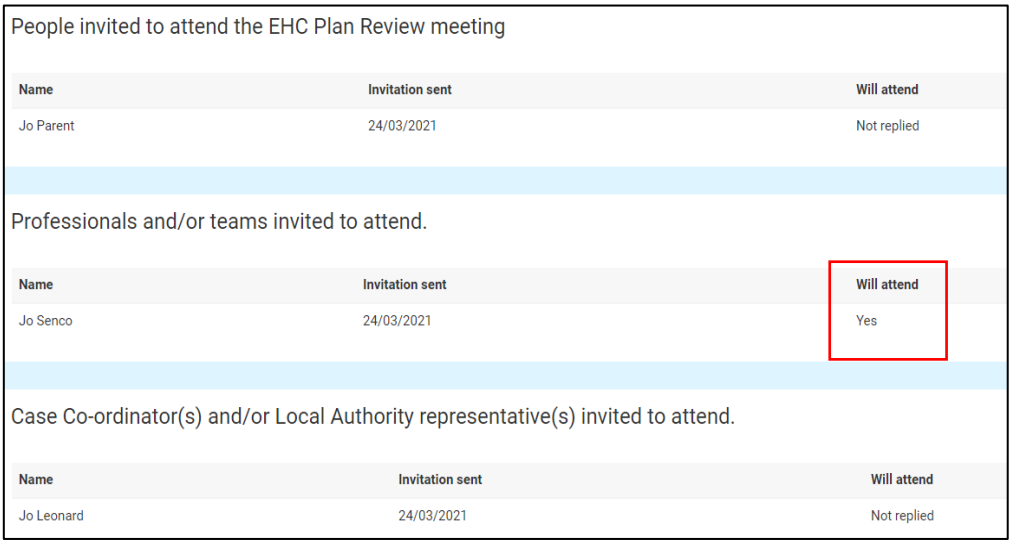
EHC Plan Review Meeting Details

This will show the date, time and location of the meeting:

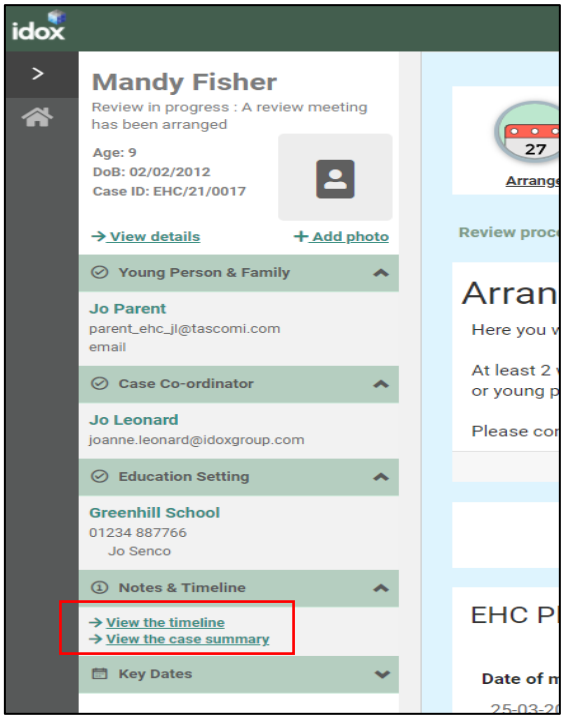


People Invited to the Meeting

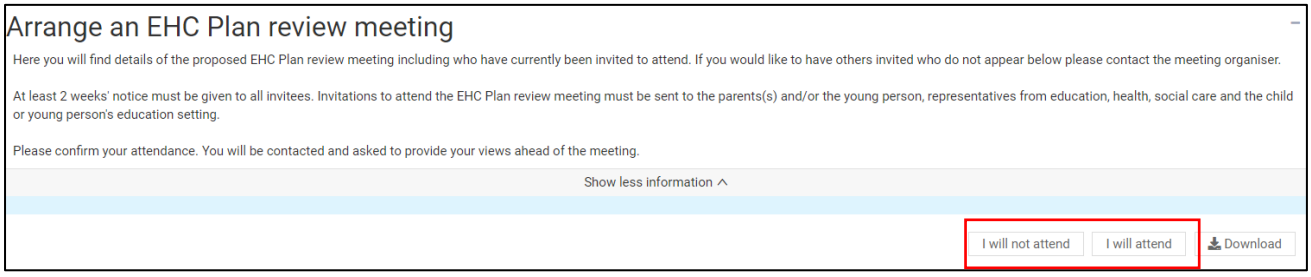
This will show all the people who have been invited to the meeting and if they have confirmed if they will attend or not:



You will need to confirm if you will or will not be attending the meeting. To do this, click on view the Case Summary on the left-hand menu bar:



At the top of the screen, there will be two buttons:



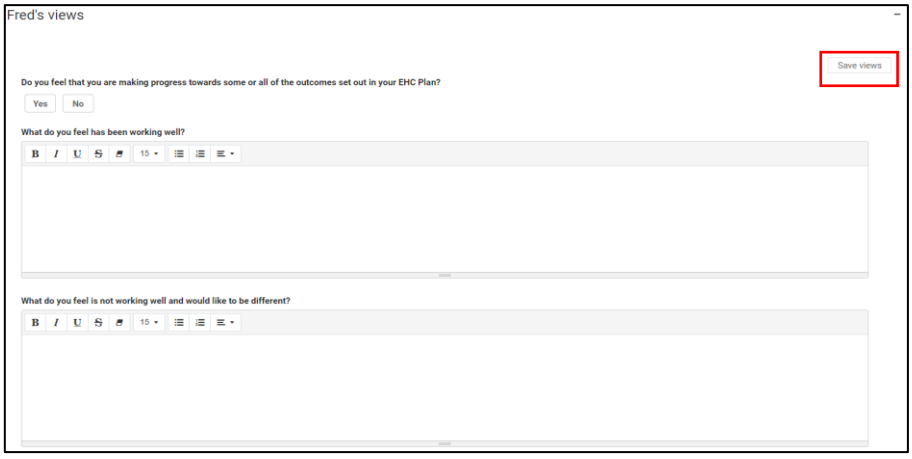
Click on the button to indicate if you will or will not attend the meeting.

Views on the Plans Progress and Outcomes

As part of the review, there will be a consultation as to if it is felt that progress is being made towards the outcomes set out in the Plan. Both you and the child or young person can put your views on this.

The Childs or Young Persons Views

The first section will be the views of the child or young person:

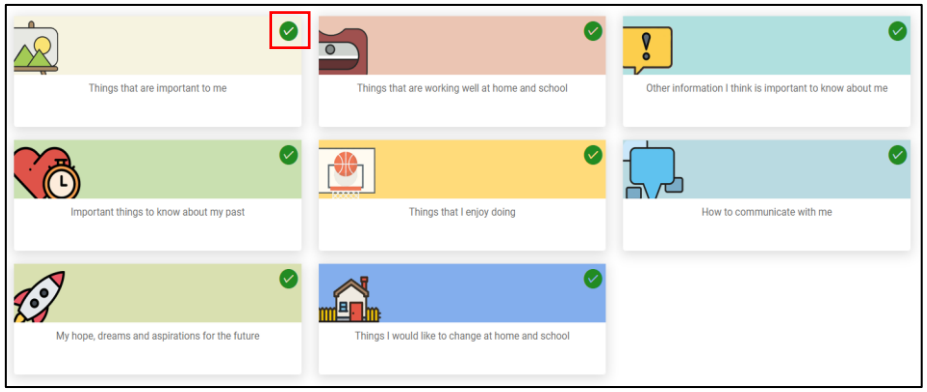


Click on the Yes or No button to indicate if you feel that progress is being made towards the outcomes in the EHC Plan.

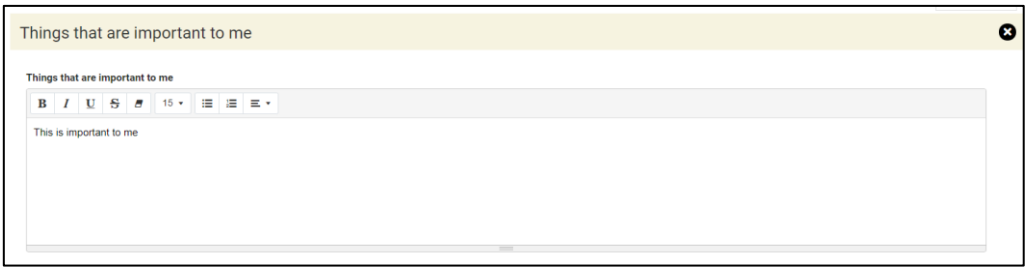
To enter more information about what is and isn't working well, left click anywhere in the boxes. Click here for more information on using free text fields.

When you have entered your views, click on Save Views.

Any information previous entered during the assessment process can be viewed below this:



A green tick in the top right-hand corner of the section means information has previously been entered this section. To view that information, click on the tile and it will be displayed:



The Parent or Carer's Views

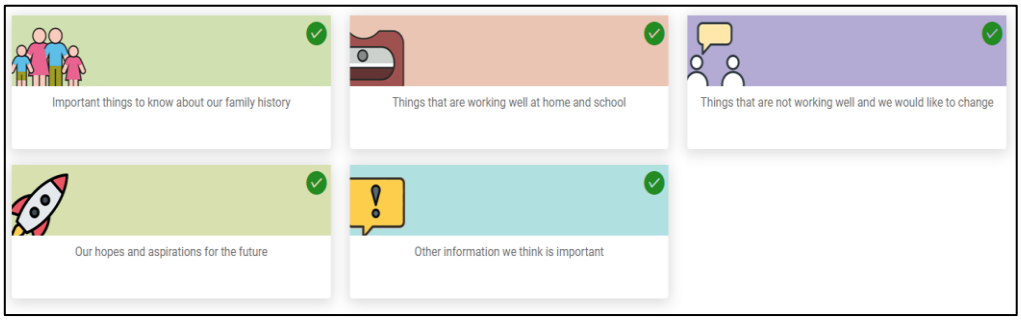
The second section is for the Parent/Carer's views:

Click on the Yes or No button to indicate if you feel that progress is being made towards the outcomes in the EHC Plan.

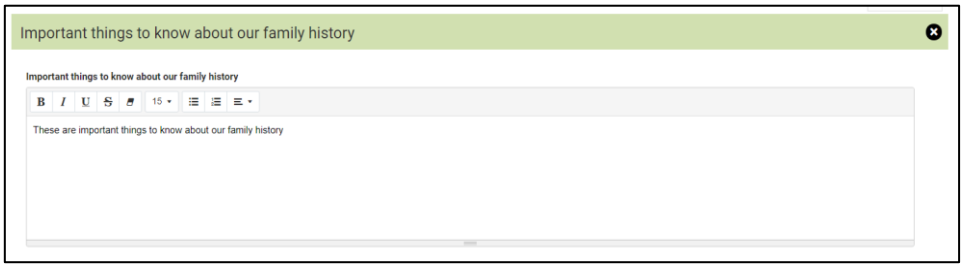
To enter more information about what is and isn't working well, left click anywhere in the boxes and start typing any information you want to enter here. Click here for more information on using free text fields:

When you have entered your views, click on Save Views.

Any information previous entered during the assessment process can be viewed below this:



A green tick in the top right-hand corner of the section means information has previously been entered this section. To view that information, click on the tile and it will be displayed:



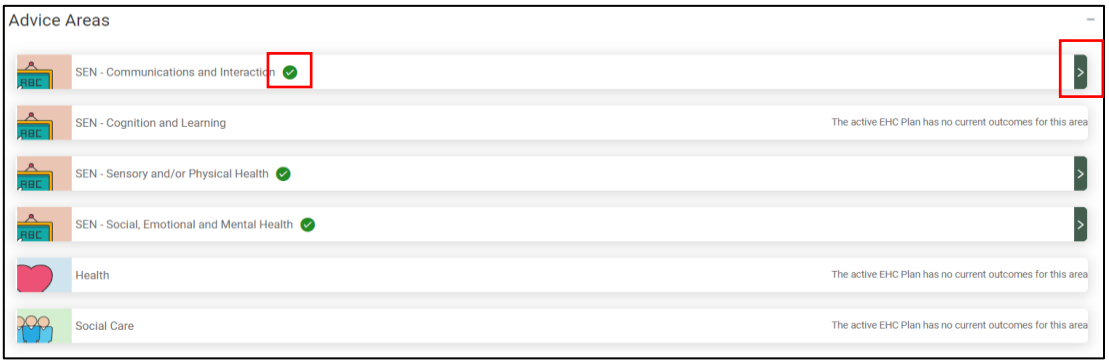
Requests for Information

At the bottom of the page, there is a section showing who else has been asked to provide their views on the progress towards outcomes of the EHC Care Plan:

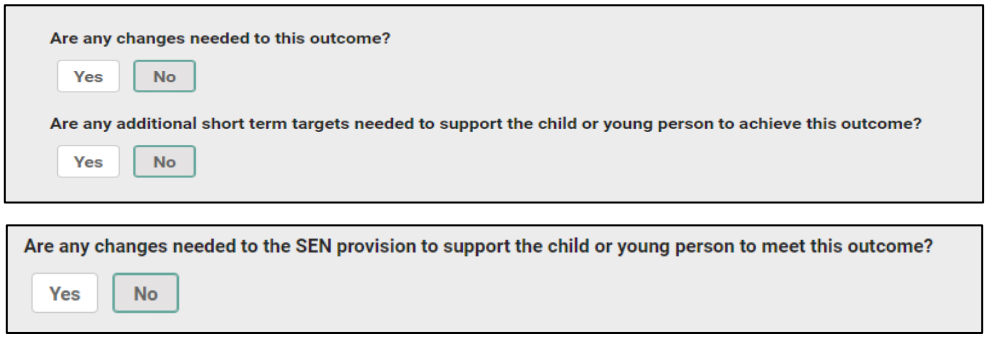
Once the response to the request for information has been received, the status will change to show this:

To view the response, click on the Green right pointing arrow and the Request for information screen will be displayed, with the information entered by the person it was requested from.

Where an advice area has been commented on, they will be displayed with a green tick and a green arrow on the right:



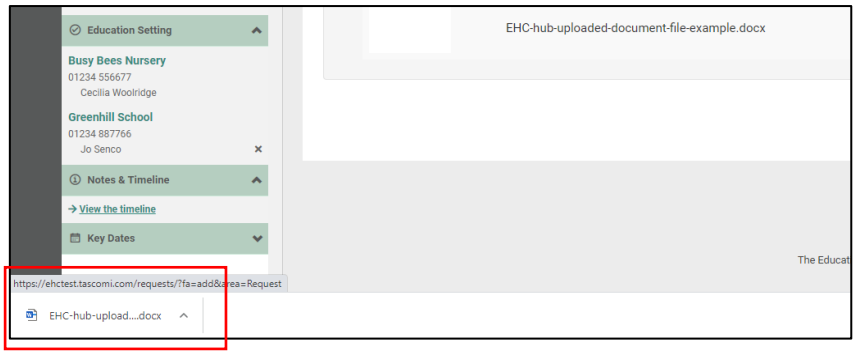
Click on the green arrow and scroll down to view the information entered. Comments will have been made as to if any changes are needed to the outcome or any additional short-term targets needed, as well any changed needed to the Special educational needs provision:



Click on the X to close the section and view another section:

. There is also a section displaying any documents that have been uploaded:

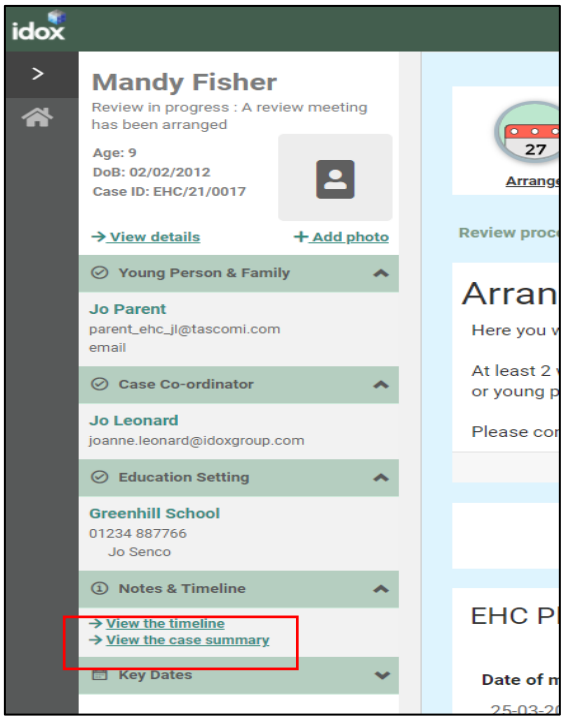
To view these documents, click on the white square and the document will show as a download in the bottom left-hand corner of the screen:



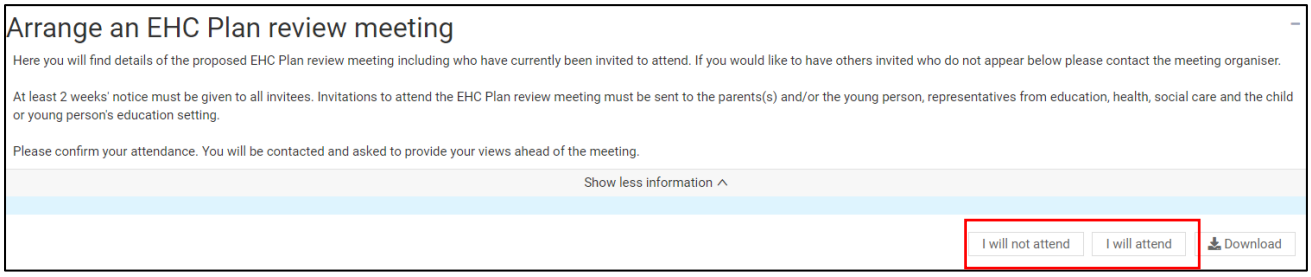
Left click on this to open it and view the information.

Confirming Attendance for the meeting

You will need to confirm if you will or will not be attending the meeting. To do this, click on view the Case Summary on the left-hand menu bar:



At the top of the screen, there will be two buttons:

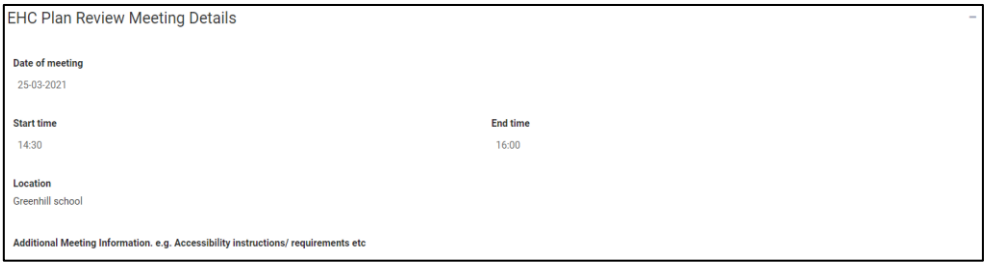


Click on the button to indicate if you will or will not attend the meeting.

As previously discussed, details of the meeting will be displayed below this

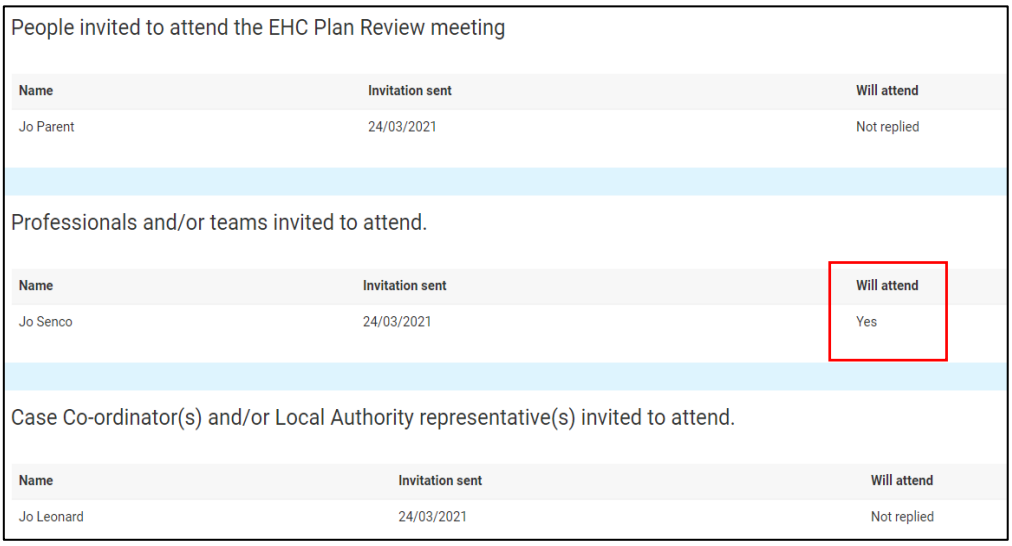
EHC Plan Review Meeting Details

This will show the date, time and location of the meeting:



People Invited to the Meeting

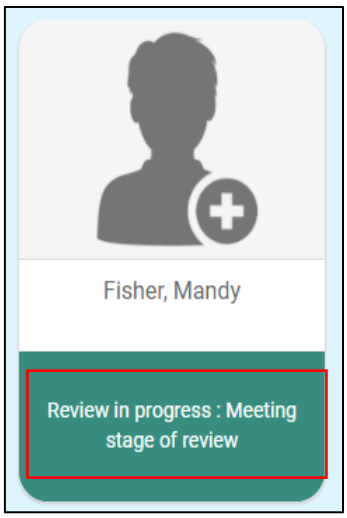
This will show all the people who have been invited to the meeting and if they have confirmed if they will attend or not:



EHC Plan Review Meeting

When the meeting has taken place, a record will be created of who was invited, who attendance and when the meeting took place. The details of the discussions held at the meeting and any recommendations made will be displayed in the next section, the Report on the review.

When the meeting record has been created, when you log into the Hub, the status will look like this:



When you click on this, the status will be displayed like this:

This has 5 sections

EHC Plan Review Meeting Details

This will show the date, start time and end time and Location of the meeting.

Record of people who were invited and attended

This will show who was invited and if they attended.

Other Attendees

This will show a list of people who were not originally invited to attend ahead of the meeting, but were in attendance

Additional Meeting Information

This will show any specific information about the meeting, like if apologies had been received or new information was brought to the meeting.

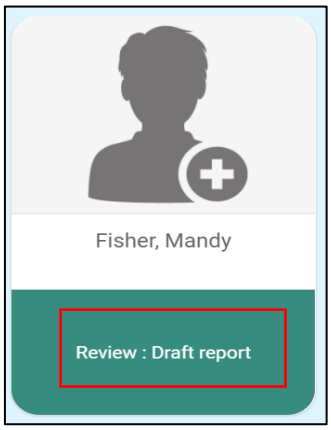
The details of the actual plan review discussion will be shown in the review report in the next section.

Meeting Documents

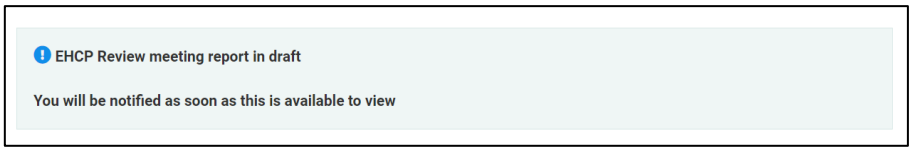
Any supporting documents from the EHC review meeting will be attached here and can be viewed.

EHC Plan Review Meeting: Draft Report

When the report on the plan review meeting is being compiled, when you log into the Hub it will look like this:

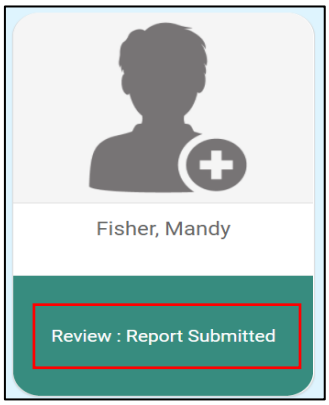


When you view the case, a message will be displayed to say that it is being drafted:

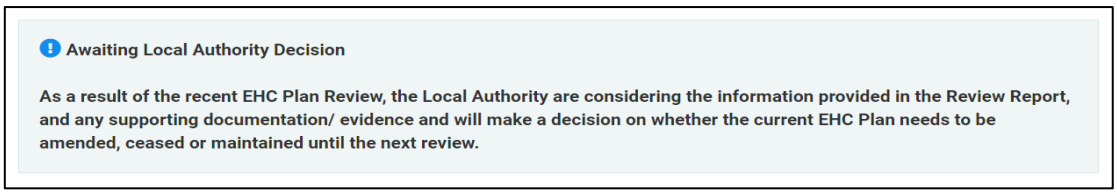


When the report is complete, it will be submitted to the local authority to consider the information provided and decide on whether the current EHC Plan needs to be amended, ceased or maintained.

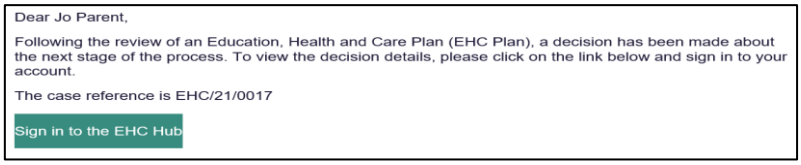
If you log into the hub, during this time, the status will look like this:



When you view the case, there will be a message to say this:



When the decision has been made about the next stage of the process, you will receive an email telling you the decision has been made and asking you to sign into the hub. This should be within four weeks of the meeting taking place:

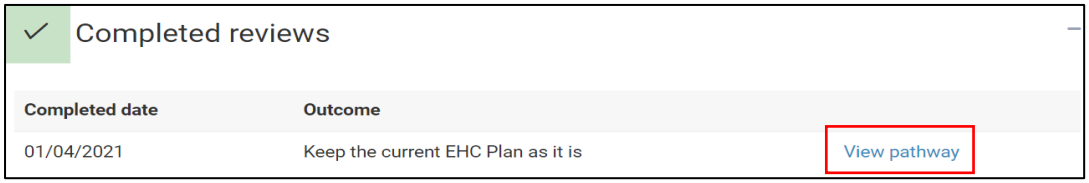


EHC Plan Review Meeting Report

When you log into the hub and click on the case file, the EHC Case Summary Page will be displayed. The contents of the page displayed will vary dependent on the outcome of the review.

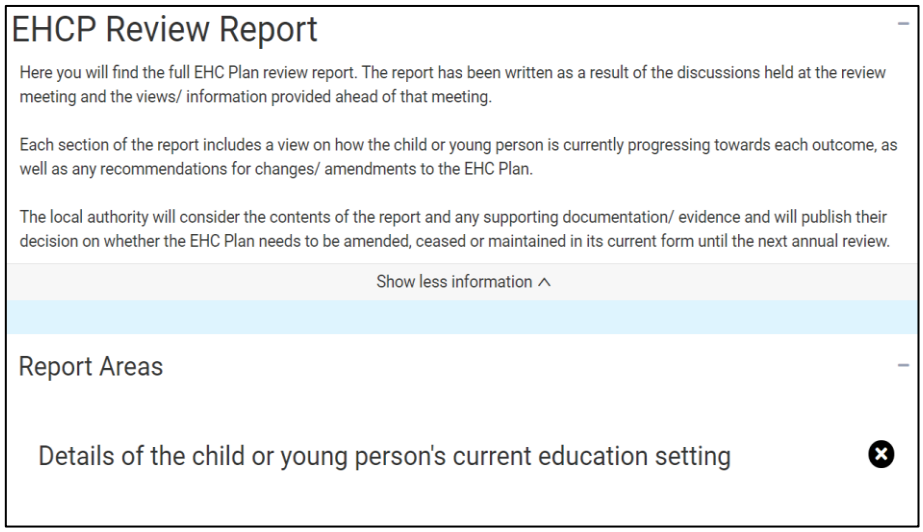
Viewing the EHC Plan Review Meeting Report

Under the Completed reviews section, click on view pathway:



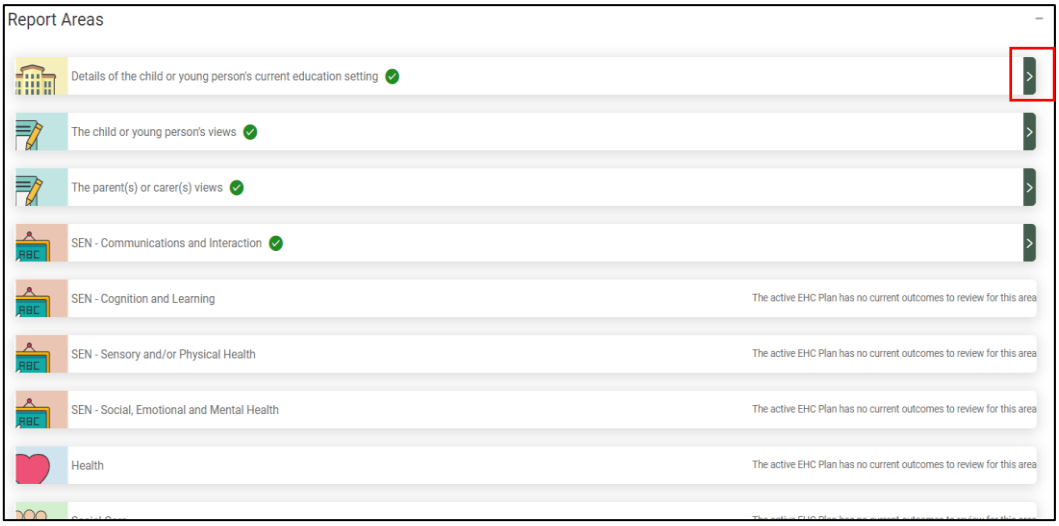
To view the Report, click on Report at the top of the screen:

The following screen will appear:

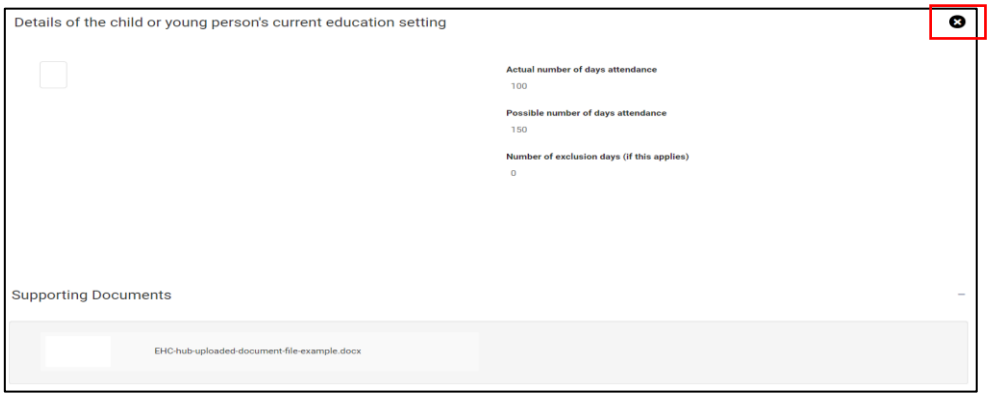


At the top of the screen will be information about the report.

Below that are listed the Report Areas:



To view the details of that area, click on the Green arrow on the right. The section will then be shown in more detail:



Click on the X to close that section and view another section.

Outcome of a Review

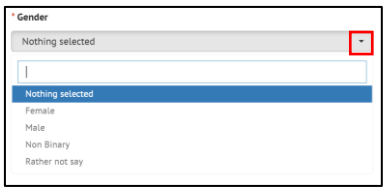
Once the review has taken place, there are three potential outcomes.

1. The local authority decides to make no changes to the plan and must be reviewed again within 12 months. Click here for more information on the review pathway.
2. The local authority decides to amend the plan based on recommendations in the review. Click here for more information on the plan
3. The local authority decides to cease to maintain the plan. The plan will be removed based on recommendations in the review. If the plan is ceased to be maintained, you will still be able to access all of the historical information on the EHC Hub.

Help Using Forms

Pick List Fields

Click on the down pointing arrow at the end of the field to view the available options for selection. There is a scroll bar on the right to allow you to scroll down to view more options in the list. Scroll down until you can see the option you require and then left click to select it. Alternatively, if you know the option you require, you can begin to type it in the field and the list will show options that match what you type:



Text Formatting

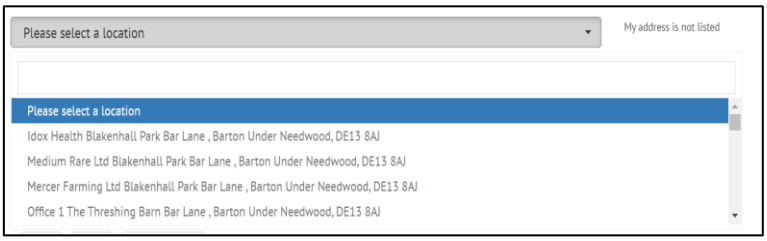
Left click anywhere in the box and start typing any information you want to enter here. If required, there are various formatting options for that can be accessed by clicking on the buttons at the top of the field. To see what each button does, hover over the button with the mouse pointer and a tool tip will be displayed to show what that button does

Entering an Address

Enter the postcode of your address in the postcode search field and click on Search:

Another field will be displayed:

Click on the down pointing arrow to view with all addresses that match that postcode:



Left click on the correct address to select it. The address will then be displayed on screen:

If the address is incorrect or needs to be removed, click on Clear address and a new location will be available to be selected.

If the correct address is not available to be selected from the list, click on the My address is not listed option, and the fields will be made available to be completed manually:

Date Fields

Type in the date required with a dash between the day, month and year. Alternatively, left click on the field and select the date from the calendar. Navigate around the calendar using the arrows in the top right and left corners until the correct date is available. Left click on the date to select it

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