Education, Health and Care (EHC) Hub Professional Contributor Guide

- **Drafting and Reviewing EHC Plans**

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Document Control

Version	Changes	Author	Date
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About this document

This document is for professional contributors to provide instructions about the [Derbyshire County Council's EHC Hub](#), covering:

- Drafting and Reviewing EHC Plans
- Final Plans
- Reviewing Contributions

Contents

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.

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

For children, young people and their families, SENCos, education settings and professionals across education, health and social care, 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.

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

Decision to Issue Plan

A child or young person's case would be available to you at this stage if you had provided advice at the assessment stage.

Once the case co-ordinator has indicated that the case is ready to progress to the decision, the status will update to reflect this in the display of the case in the My cases in progress

Once the decision has been published, you will get an email asking you to log in to the hub to view the decision:

When you log into the hub, the status will be displayed. If the decision has been made to issue an EHC Plan, the status will look like this:

If the decision was made not to proceed to issue a plan, the case will not be displayed in your 'My cases in progress' work tray as this case will be classed as closed. To view the information, select tick 'Include closed cases' in the filters at the top of the page:

The case file will show a status of Decision made not to issue an EHC Plan:

For more information about the decision, click the Child/Young person's name.

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 issue an EHC plan at this time

Decision to issue plan date   Letter
07 Sep 2021   ⬇ Download
Was the assessment carried out by another local authority?
  ○ No
  ○ Yes
  Clear Selection
Reason for decision
this is the reason

ⓘ 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 'Download' and a copy can be saved to your device.

You can view the information previously entered in the needs assessment process by clicking on Assessment in the icon bar at the top:

📄	⟩	🔖	⟩	👤	⟩	🔖	⟩	📄
1. Request		2. Decision		3. Assessment		4. Decision		5. EHC Plan

Viewing the Draft Plan

When the draft plan is being created, before it has been shared, the case status will look like this:

You will also see a message at 'Plan' stage advising that the plan is currently being drafted:

Once the draft plan has been created, it will be shared by the case co-ordinator, and you will receive an email to this effect:

The status of the case file will change to 'Draft EHC Plan (shared)'.

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, click 'Open' on that section. Here is a summary of each plan section:

EHCP Section A – click 'Open' on this to display the information entered by the Parent/Carer and /or young person.

This has three parts:

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

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

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

EHCP Sections D, E, H1 and H2 – click 'Open' 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.

EHCP Section I – click Open' on this to display information about the Education Setting. This information may not populated at this draft plan stage. The settings will be recorded in the Final EHC Plan.

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

- Personal Budget
- Annual Cost of Support

EHCP Information and Advice – click 'Open' on this to display any information and advice provided by professionals during the assessment process.

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 'View':

You will then be able to view the information. When you have finished looking at this information, click 'Close':

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

Some sections may have multiple areas to view, for example Section B, E & F could have outcomes, provisions, etc.

When you click 'Open' for Section B, E & F, the following screen will show and you will be able to expand the 4 SEN areas:

When you expand a SEN area, you will be able to view any information that has been entered.

Strengths, needs & outcomes:

There could be more than one outcome, you will need to scroll down to see if anymore outcomes have been added.

Communication and Interaction   ⌃

This has been identified as an area of need

Strengths
Valini's Communication and Interaction strengths are:

1.
2.
3.
4.

Needs
Valini's Communication and Interaction needs are:

1.
2.
3.

Outcome   ⌃

Outcome 1 for Valini's Communication and Interaction needs..........

Preparing for adulthood type

Employment, Good Health   ⌄

Steps to achieve outcomes:

Steps   ⌃

What are the short-term target(s) to achieve this outcome?   ⌃

Steps to achieving outcome   Date to be achieved by
Step 1   21/10/2021

What are the short-term target(s) to achieve this outcome?   ⌃

Steps to achieving outcome   Date to be achieved by
Step 2   dd/mm/yyyy

<u>Provisions:</u>

There could be more than one provision added for each outcome, these will be listed one after the other.

Provision ^

Support Needed
This is the recommended support for Valini:

-
-
-

To be provided by   Staff / Student ratio
Parents   1:1

How much / Quantity
30 minutes.

How often
Once a week.

Provision ^

Support Needed
This is the recommended support............

To be provided by   Staff / Student ratio
School   1:3

How much / Quantity
1 hour.

How often
Once a week.

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

Health Needs, Outcomes & provisions

EHCP Sections C, E & G   ×

This section does not apply

Strengths

Needs

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:

EHCP Sections B, E & F   ☒

Provide a summary of the Child / Young person's special educational needs

Category of need   Primary need

Nothing selected   ⌄   Nothing selected   ⌄

Secondary need

Nothing selected   ⌄

Downloading a Draft Plan

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

Downloads

Download draft plan PDF

Download draft plan (MS Word) DOC

Download draft letter PDF

The downloaded plan file will appear on your screen:

Downloads   🗂 🔍 ⋯ 📌

📄 20230912101407-plan-file.pdf
      Open file

Click 'Open file' to view the contents of the PDF file. This can be saved to your own device, if required.

EHC Plan Consultations

A child or young person's case would be available to you at this stage if you had provided advice at the assessment stage.

Young Person/Parents/Guardians/Carers

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:

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 the comments have been entered, the status will change to show completed.

The parents can comment on any section of the plan, if a parent has left comments, you will see a speech bubble indicator on the top right of the plan section. You will then be able to view those comments by clicking 'Open' on the relevant plan section:

The comments will be visible and will display when the comments were added and by which parent:

Education Settings

If an education setting has consulted on the plan, you will be able to view their response by clicking 'Open':

You can also download the letter that was sent to the Education Setting for consultation.

Finalised and Issued EHCP

A child or young person's case would be available to you at this stage if you had provided advice at the assessment stage and the EHC Plan was issued in the last 60 days.

Once the case co-ordinator has finalised the EHCP, it will be issued. An email will be sent to inform you of this; it will look something like this:

When you log into the hub, the case file will no longer be displayed in the My cases in progress tray, as the plan has been issued. The case will now be displayed in the My live cases tray.

You will retain access to this case for a set period after the Plan has been issued, then you will lose access to the case, and it will no longer be visible to you in your list of cases. The default for this is 60 days after the plan has been issued.

The status of the file will show as Review pending, as that is the next stage the process that the hub will manage:

When you click on the file, the EHC Case Summary will be displayed:

EHC Case Summary

On this page you will find quick links to various stages/ processes of a child or young person's EHC case.

For some children/ Young people, their EHC journey may not have started on this EHC Hub and so historic case information may be limited. If this is the case, please contact the Local Authority for further information.
Less...

📄 Education, Health & Care Plan   ⌃

The EHC Plan was finalised on 07/09/2023

📄 Download EHC Plan

🔄 Review not yet started   ⌃

The EHC Plan must be reviewed by 07/09/2024. This is the date by when the local authority must publish their decision on the outcome of the review.

To meet this deadline, it's recommended the next review be started no later than 18/05/2024

✓ EHC Assessment and Planning pathway   ⌃

Completed on 07/09/2023

Click on the link below to access the EHC Assessment and Planning pathway
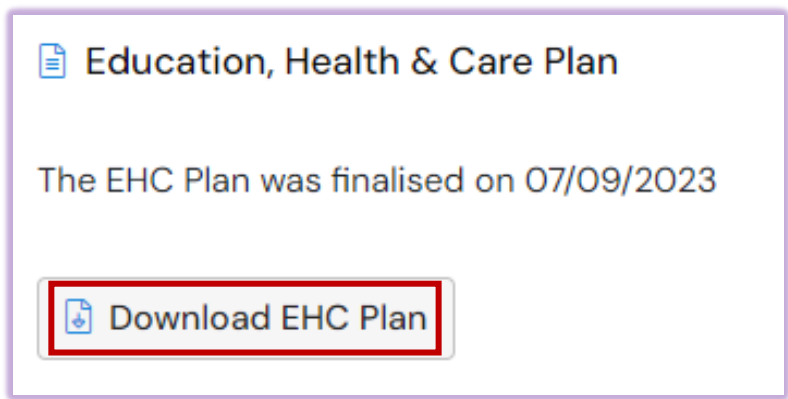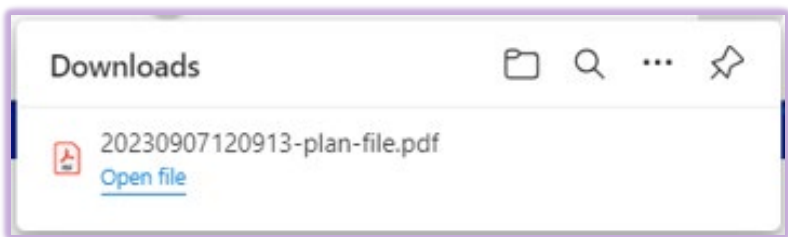
⊕ View pathway

This has three sections.

- Education, Health and Care Plan
- Review not yet started
- EHC Assessment and Planning Pathway

<u>Education, Health and Care Plan</u>
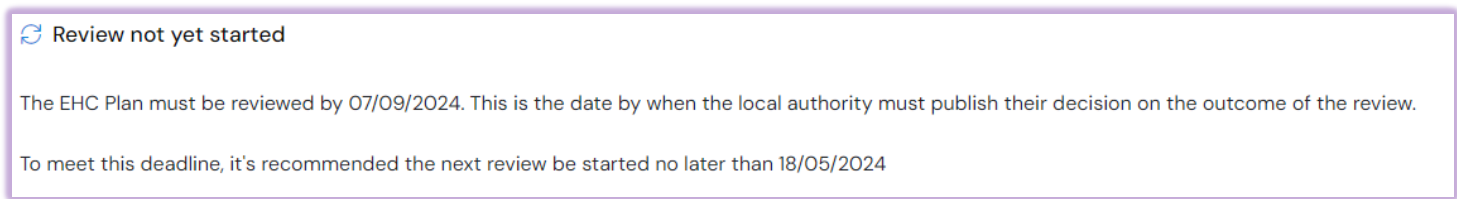
This section will allow you to Download the EHC Plan:

The downloaded plan will then be available to save to your device.

Review not yet started

This will display the date by when the review process must have been completed by and a recommended date by when to have started the review to be able to meet that deadline.

EHC Assessment and Planning pathway

This will display the date the assessment and planning pathway was completed, and has a link to enable you to view the pathway:
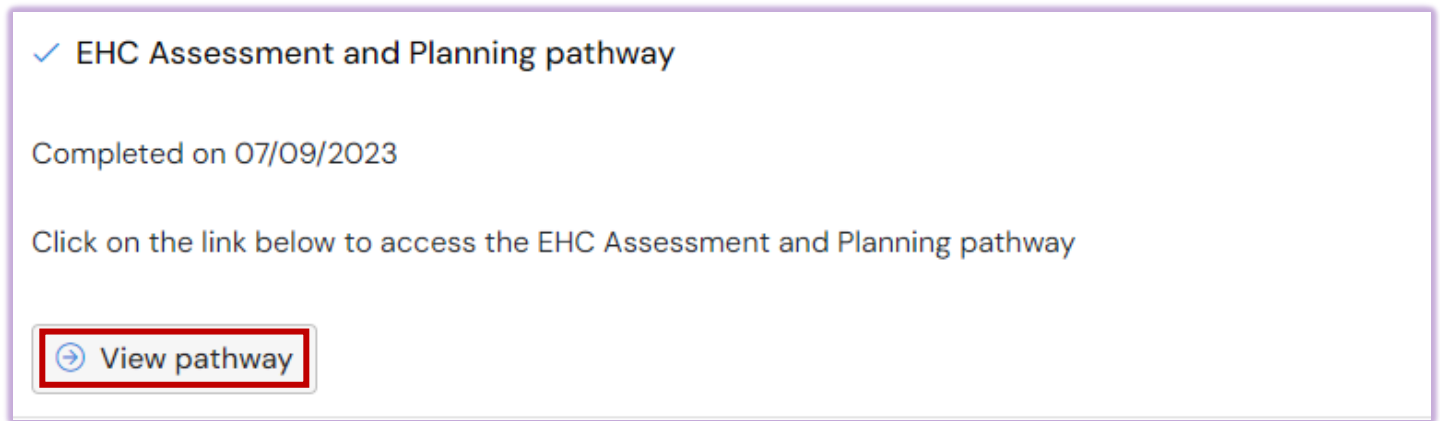
This information will not be available for EHC Plans that have been imported. This is because their assessment and planning process will have been completed outside of the EHC Hub.

Invited to an EHC Plan Review

If you are invited to an EHC Plan Review you will receive an email notification that will look similar to this:

Dear Alana – Contributor,

Case ID: 3559

You have been invited to an EHC Plan review meeting. To view details of the child or young person and the meeting, please click on the link below and sign in to your account.

[Sign in to your account]

An invitation is attached to this email, which can be added to your calendar.

Best regards,
EHC Hub Team

How to contribute to an EHC Plan Review

If you have been requested to contribute to an EHC Plan Review, you will receive an email to this effect. The email will look like this:

Dear Alana – Contributor,

Case ID: 3559

You have been requested to provide views about a child or young person's progress towards outcomes agreed in their Education, Health and Care Plan (EHC Plan). This is part of the EHC Plan review process under Section 44 (1) of the Children and Families Act 2014. To view the case and provide a response, please sign in to your account.

[Sign in to your account]

Your views must be submitted to us no later than 2 weeks before the scheduled review meeting.

Best regards,
EHC Hub Team

When you log into the hub, the case will be displayed in your My cases in progress work tray and can be found by using the case reference included in the notification email.

When you click on the case file, it will look like this:

Arrange Stage

One this page, you can view the details of the review meeting, a list of the attendees of that meeting, it will show if they have said if they will attend or not.

Click on Arrange:
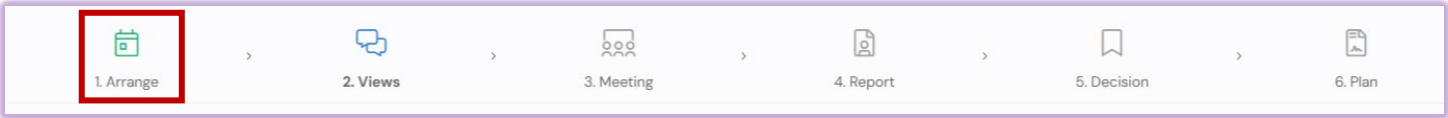
The Arrange page will be displayed. The top of the page will display the date, time and location of the meeting:

The bottom of the page will display who has been invited to attend the meeting and if they have indicated if they will attend:

You can also indicate if you intend to attend the meeting, you will see the below buttons:

Click 'Download' to view a copy of the review meeting invitation letter.

Views stage

On this page, you can access views submitted ahead of the review meeting.

The views page provides access to complete your response and lists who else has been requested to provide their views. You will be able to view all responses once your (or your team's) response has been submitted.

The template for you to complete has been set by the hub as a way of consistently gathering information from all professionals. You can also upload additional documents to support your views.

The information submitted can be used for discussion at the review meeting and may later be included in the education setting's report of recommendations to the local authority.

The setting may choose to include all, some or none of the views received to produce their report. Your original submission of views at this stage cannot be changed by any person.

At the bottom of this page there are two areas for the child/ young person and the parent, carer or guardian to record their views.

Responding to a request for information

To respond to a request for information, click 'Read' beside your request:

The request for information page will be displayed, you will need to complete information about the response:

Are you providing a response on behalf of someone else – click on the Yes or No button as appropriate.

Name of the person providing the advice – enter the name of the person providing the advice. If the local authority later decide to issue an EHC plan, this will be the name attributed to this advice response in Section K.

Job title or role of the person providing advice – enter the job title of role of the person providing advice.

Will you provide information and advice for this child/young person – click Yes or No. If you answer No to this question, it is mandatory that you enter details as to why. If your response is part of a request for information made to a team, this part may not appear to you or have already been completed.

Below that, there are 6 more sections:

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

If a section has information in the current EHC Plan, it will have a green tick next to it. If a section has information and outcomes, it will have a green tick next to it and it will show how many outcomes there are.

To review the information in each section, click on the green arrow on the right. The information previously entered as part of the plan will be displayed.

NOTE: Each section has the same questions which you can answer and commented on where appropriate:

Is there any change to the strengths and/or needs

If you click Yes, a free text field will appear for you to enter details of the change:

Outcome(s) - You can comment on Current Progress towards this outcome. To do this, click on the down pointing arrow at the end of the field:

Steps to achieving this outcome:

What has been working well: This is a free text field.

Are there any changes needed to this outcome – Click Yes or No. If you select Yes, a free text field will be displayed to enter information about this.

Are there additional short-term targets –Click Yes or No. If you select Yes, click on Add a new step to enter information about the new step.

Are there any changes needed to the SEN provision to support the child or young person to meet this outcome – click Yes or No. If you select Yes, click on add a new provision to enter information about the new provision or recommended changes to existing provision.

When you are entering information, there is a save button at the top of the page that you can use to save what you have written:

Documents

Any addition information to support the advice can be uploaded here:
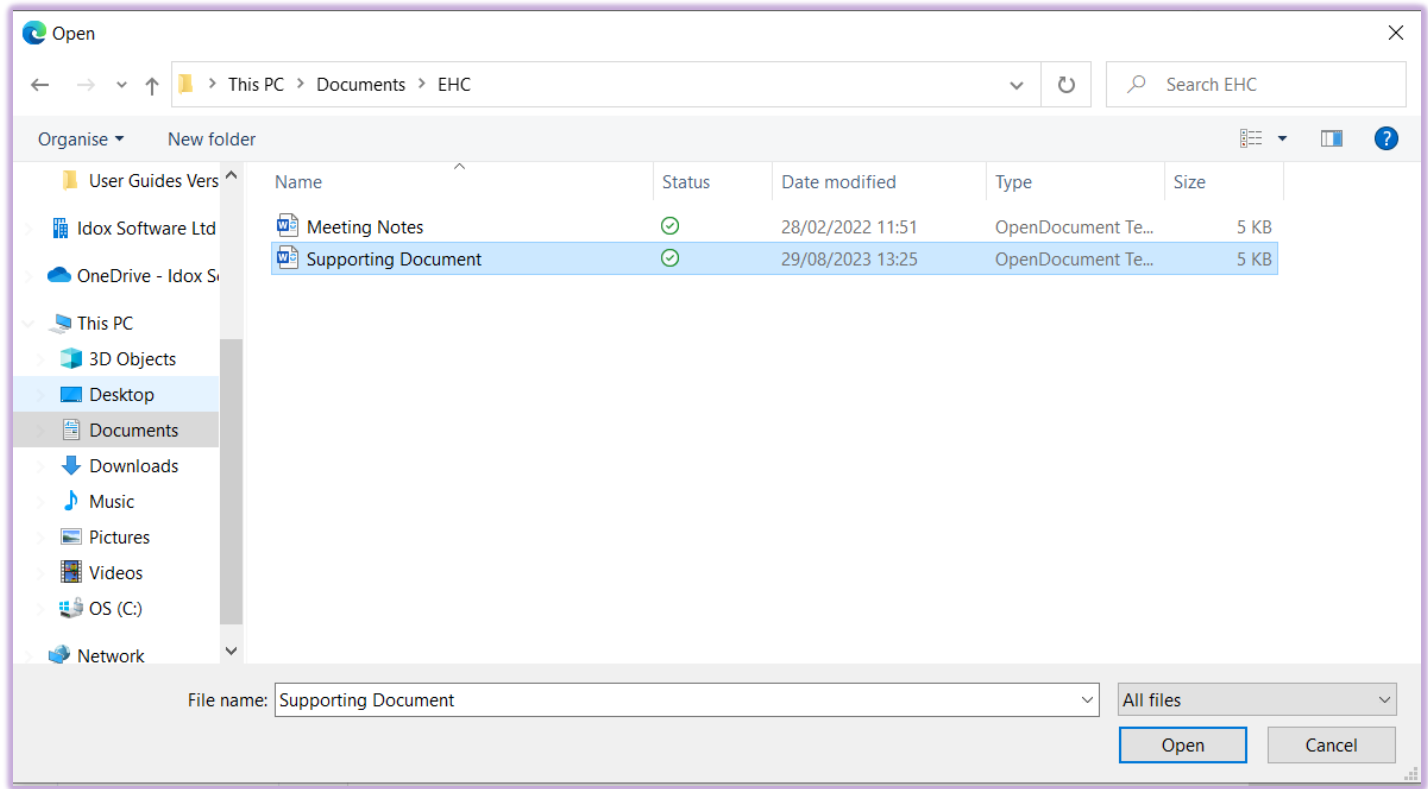
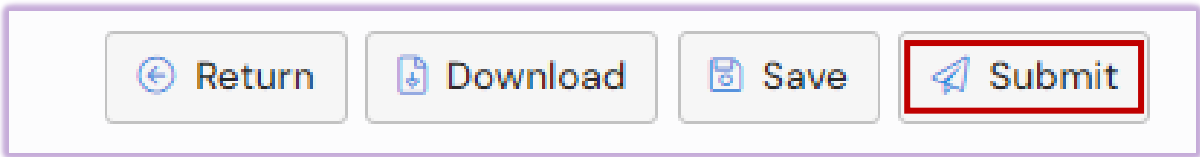If you want to add any documents, click 'Add Files':

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

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

Once you have completed the information for all the relevant sections, click on Submit information at the top of the screen:

The Child or Young Person's Views

You will also be able to view any information entered for the views of the Child or Young Person. As this is a review, the Child/Young Person can comment on whether they feel they are making progess or not. This information will be available for you to view:

Do you feel that you are making progress towards some or all of the outcomes set out in your EHC Plan?
◉ Yes   ○ No

What do you feel has been working well?
I think the following is working well:

-
-
-
-

What do you feel is not working well and would like to be different?
I feel the following isn't working well:

1.
2.
3.
4.
5.
6.

If there are green ticks on any section, this means there is information that you can view. To view that information:

Things that are important to me
Open

Things that are working well at home and school
Open

Other information I think is important to know about me
Open

Important things to know about my past
Open

Things that I enjoy doing
Open

How to communicate with me
Open

My hope, dreams and aspirations for the future
Open

Things I would like to change at home and school
Open

Click 'Open' and the information will be visible:

Things that are working well at home and school   ✕

Things that are working well at home and school
These things are working well.....

Maximum number of files = 100

The Parent, Carer or Guardian's Views

You will be able to view any information entered for the views of the Parent, Carer or Guardian. As this is a review, the Parent, Carer or Guardian can comment on whether they feel they are making progress or not. This information will be available for you to view:

Do you feel that Jordan is making progress towards some or all of the outcomes set out in the EHC Plan?
○ Yes ◉ No

What do you feel has been working well?
I feel like these are working well:

-
-

What do you feel is not working well and would like to be different?
I feel like these are not working well:

1.
2.
3.
4.
5.
6.

If there are green ticks on any section, this means there is information that you can view. To view that information:

Important things to know about our family history
Open

Things that are working well at home and school
Open

Things that are not working well and we would like to change
Open

Our hopes and aspirations for the future
Open

Other information we think is important
Open

Click 'Open' and the information will be visible:

Important things to know about our family history   ✕

Important things to know about our family history
These are the important things to know............

Maximum number of files = 100

Team Manager allocation of requests

The term "manager" in the context of the EHC Hub means a person with access to the hub under the contributor role, is linked to a team in the hub and has been granted the permission level of 'manager' for that team.

The 'manager' level of permission allows requests made to a team to be allocated to one or more members of the team and to see all child and young person's cases linked to the team via a "Team cases" work tray.

When a request for advice or information is sent to a team, the email notification will go to the team's contact email address. A team manager will be able to allocate the request to the appropriate individual team member(s), the email will look similar to this:

Dear Educational Psychology Team,

Case ID: 3559

Your team has been requested to provide advice about a child or young person as part of the EHC needs assessment process under Section 36 (1) of the Children and Families Act 2014. To view the case and allocate this request to an individual(s) to provide advice, please sign in to your account.

Sign in to your account

Your team's advice must be provided within 6 weeks of the request date. This timeframe has been set by the time limits in the Special Education Needs and Disability Regulations 2014.

Best regards,
EHC Hub Team

It is recommended that the team's contact email address is set in the EHC Hub as one where its inbox can be accessed by at least one person in the team designated as a 'manager'.

Linking people to teams, designating team managers and setting up a team's contact email address is under the control of an administrator in the local authority.

If you are a manager within one or more teams, an extra icon will be displayed for the Team cases work tray:

The Team cases work tray can be searched and filtered in the same way as the My cases in progress work tray.

Two useful ways to find cases in this work tray is to filter cases using the specific case reference detailed in the notification email, or to utilise the filter "Awaiting allocation":

Clicking on the Child/Young Persons name will open the details to the current stage where you can see the list of requests for advice (Assessment) or requests for information (Review).

To the right of your team's name, click the link "Add a professional". This is where you are asked to specify if your organisation or team will be providing a response for this child or young person:

You will then be asked if you will provide information and advice for this child/young person:

If your team is unable to provide advice or information, indicate so in this space and giving a reason where asked to do so.

If you select a 'Yes' response, you will be able to allocate the request to one or more team members, as needed.

Click the down pointing arrow at the end of to select which team member and then click 'Add':

The team member that has been added will then be displayed in the list below:

Name	Status	Action
Alana – Contributor	Response pending	✕ Close
JC Contributor Manager	Closed by manager	↻ Re-open
vish contributor	Response pending	✕ Close

If you are unable to locate the team member in the dropdown list, you will have an option to 'Add new Team Member' at the bottom of the dropdown list:

Nothing selected	^
Margot Pettigrew	
JC Contributor Manager	
vish contributor	
Contributor1-EHC	
Alana – Contributor	
Add new Team Member	

If you select 'Add new Team Member' and click 'Add' you will then see this page, asking you to complete some fields:

Add new team member

* Name

This is how it will appear to other people.

* Email address

This is used for account login and to receive email notifications.

* Confirm email address

This is necessary to avoid mistakes when updating the email address.

* Speciality

Nothing selected

⊕ Add   ⊘ Cancel

Once you have completed these sections and click 'Add', the user will appear in the list, they will also be created in the EHC Hub and will be visible for your Team allocations in the future. This new team member will also be sending an email to register their account so they can log into the EHC Hub.

Within the section, you can also close requests by clicking the 'Close' button beside the member of your team. This will change their status from 'Response pending' to 'Closed by manager', you can also Re-open closed requests by clicking 'Re-open' which will change the status from 'Closed by manager' to 'Response pending'.

When you add a team member, they will receive an email notification like this:

Dear Alana – Contributor,

Case ID: 3559

You have been requested to provide advice about a child or young person as part of the EHC needs assessment process under Section 36 (1) of the Children and Families Act 2014. To view the case and provide a response, please sign in to your account.

Sign in to your account

Your advice must be provided within 6 weeks of the request date. This timeframe has been set by the time limits in the Special Education Needs and Disability Regulations 2014.

Best regards,
EHC Hub Team

The file will still be displayed in the Team cases work tray, but the allocation warning will no longer be displayed.

The case will also appear in the My cases in progress work tray for that user.

As a Team Manager you will have the ability to view any advice/information requests for your team, click 'Read' and you will have a read only view of their advice/information response.

The team's response will be marked as completed once all team member's allocated response has been submitted.

Contact Us

Post:
Derbyshire SEND Admin
Derbyshire County Council
County Hall
Matlock
DE4 3AG

Email:
CS.SENDAdmin@derbyshire.gov.uk