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

- **Managing Cases and Providing Advice**

Classification: Public

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Document Control

Version	Changes	Author	Date
V1.0	Created	Derbyshire Local Offer	September 2025

About this document

This document is a guide for persons involved in providing advice to a child or young person's Education, Health and Care (EHC) Needs Assessment or views as part of a review of an EHC Plan using Derbyshire County Council's EHC Hub.

In the context of this document, "the contributor role" relates specifically to the level of access and permissions granted to an EHC Hub user account.

A person accessing the EHC Hub with the contributor role may include any professional within education, health and care involved in directly responding to requests for information or the allocation or management within a team of contributors.

The local authority has control and responsibility for granting the contributor role to relevant persons, to link relevant persons to teams and designate managers within teams.

This document covers:

- Case Navigation
- How to contribute to an EHC needs assessment
- Advice Submission
- Document Uploads

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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.

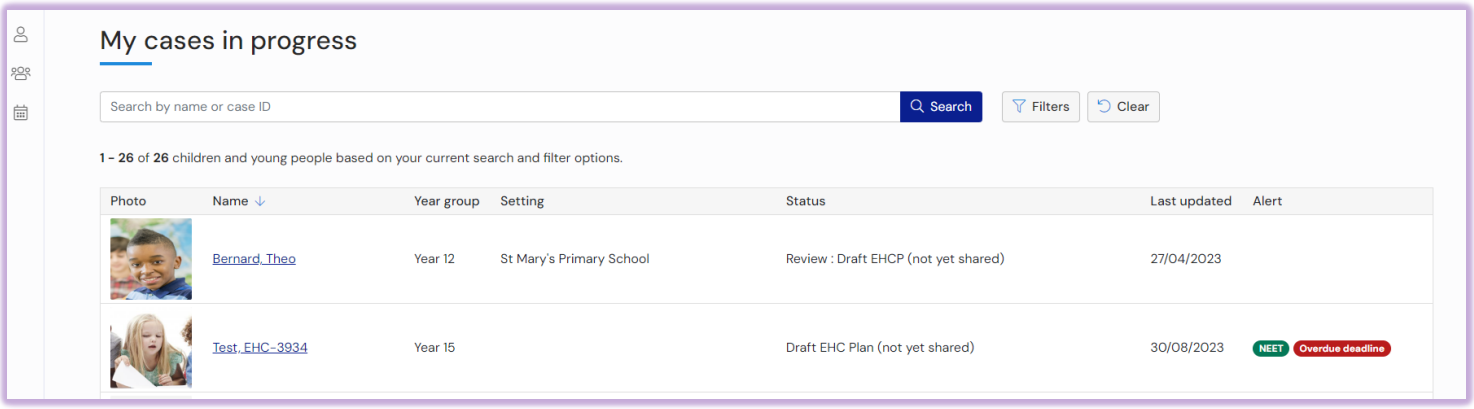
One of its most powerful features is the opportunity that it provides to truly capture the child or young person's voice. The *About Me* and *My Parent / Carer's Views* areas are unique multimedia spaces for uploading short video clips, photographs and scanned documents alongside written text to capture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

The EHC Hub offers:

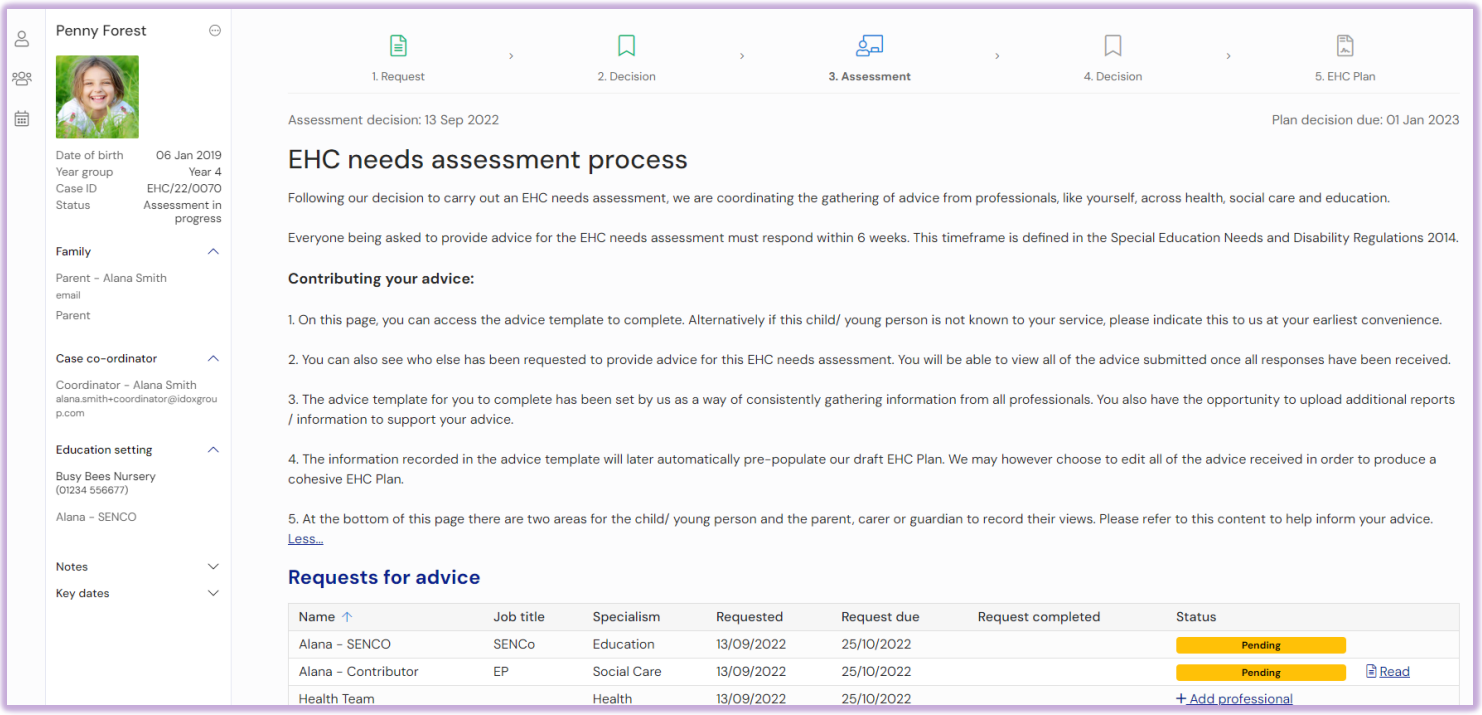
- Online EHC assessment request pathway, including uploading/ sharing reports and or documents
- EHC case tracker with clear, contextual information advice and guidance as well as complete visibility of the statutory timeframes that relate to their case (review and assessment)
- Multimedia spaces to 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

Viewing the 'My Cases in Progress' work tray

When you log into the EHC Hub, you will see a list of any cases currently assigned to you that are in progress:

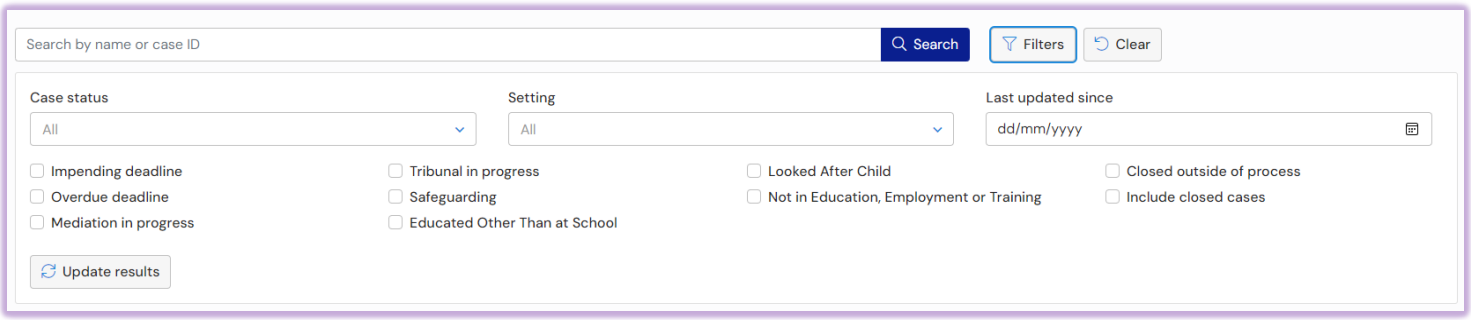


To view a case, click the Child/Young person's name. The case file will be displayed:

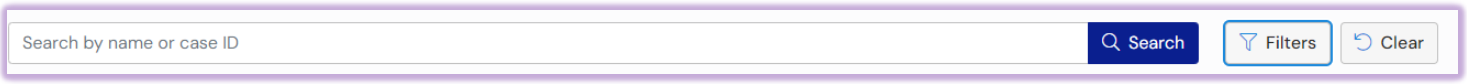


Searching for a Case

By default, all cases in progress assigned to a contributor will be displayed. There are to methods to search through your cases, the search bar and the filters, at the top of the screen:

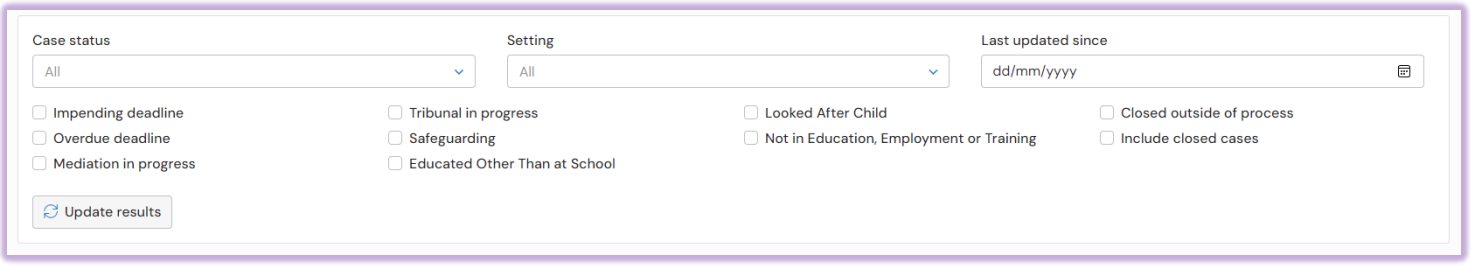


Using the search bar:



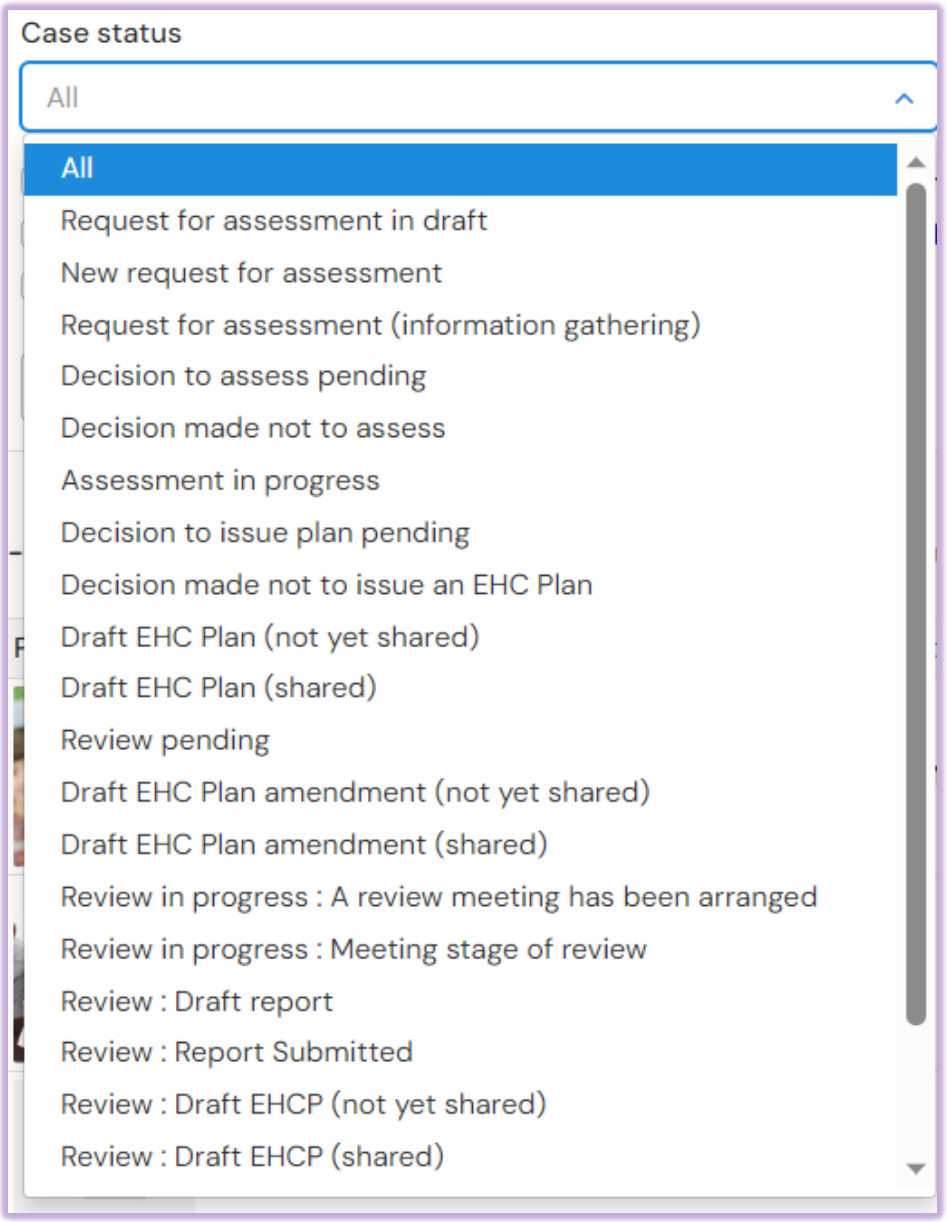
Start typing the name or the case ID into this field and the system will filter the list to display cases that match this criterion. For example, if you start typing “ha” in here, any case name that contain ha will be displayed.

Using the filters:

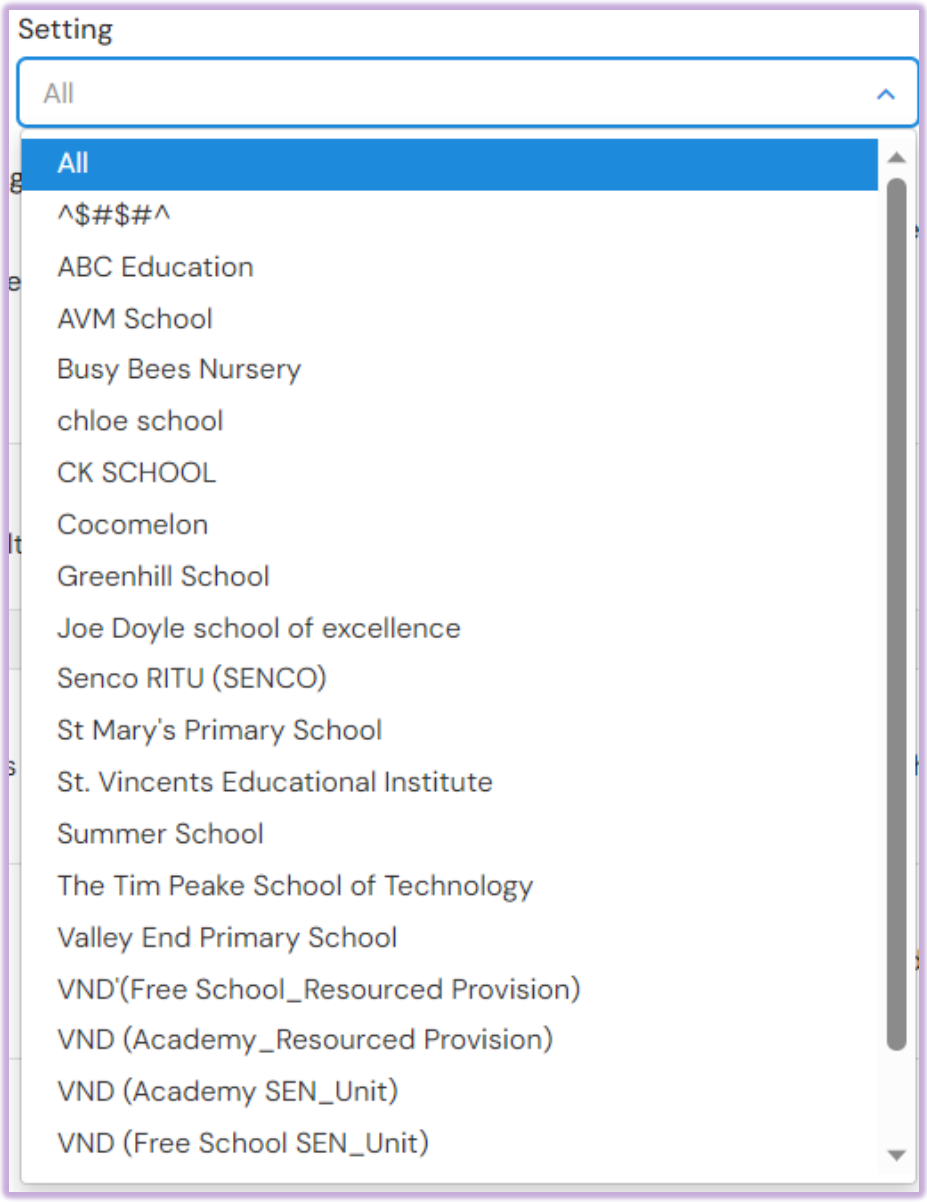


The display can be filtered by Case Status, Education setting and Last updated since.

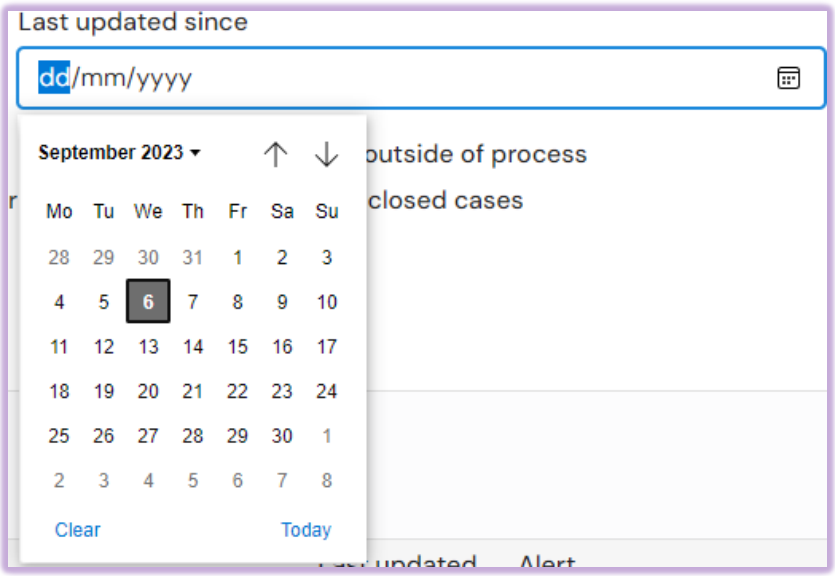
Case Status – click ‘All’ in the Case status field and a box will be displayed showing all the statuses available. Click to select the required status:



Education Setting – Click on All in the Education setting field to view the available education settings. Click to select the required education setting:



Last updated since – 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.

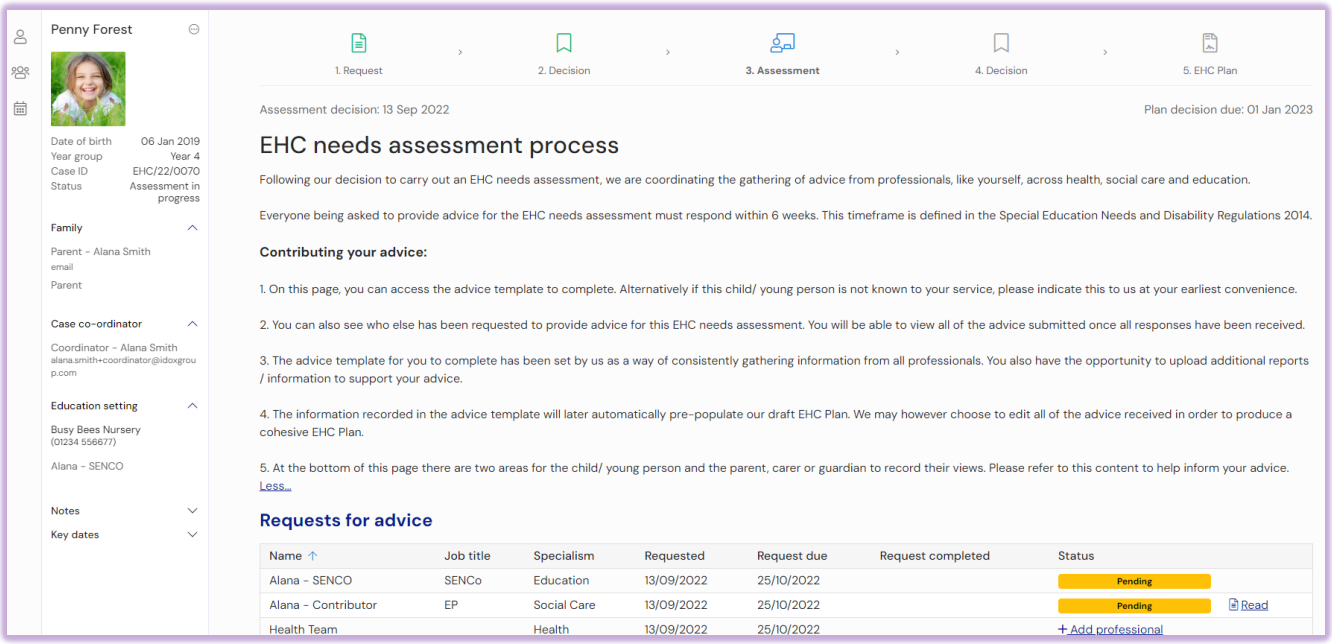
There are also 10 checkboxes for you to use:

- Impending Deadline
- Overdue Deadline
- Mediation in progress
- Tribunal in progress
- Safeguarding
- Educated Other Than at School
- Looked After Child
- Not in Education, Employment or Training
- Closed outside of Process
- Include closed cases

To clear any filters, click ‘Clear’ all filters button at the top of the filters.

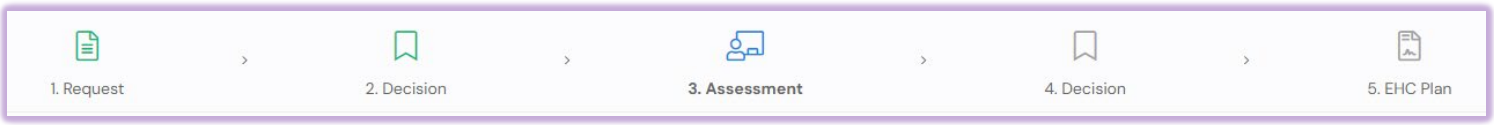
Viewing a Case File

To view a case, click the Child/Young persons name. The following page will appear:

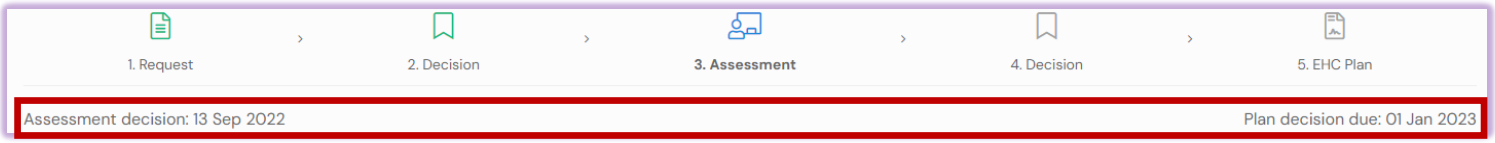


Status of the Process

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



Underneath this, key details relevant to the stage of the process will be displayed:

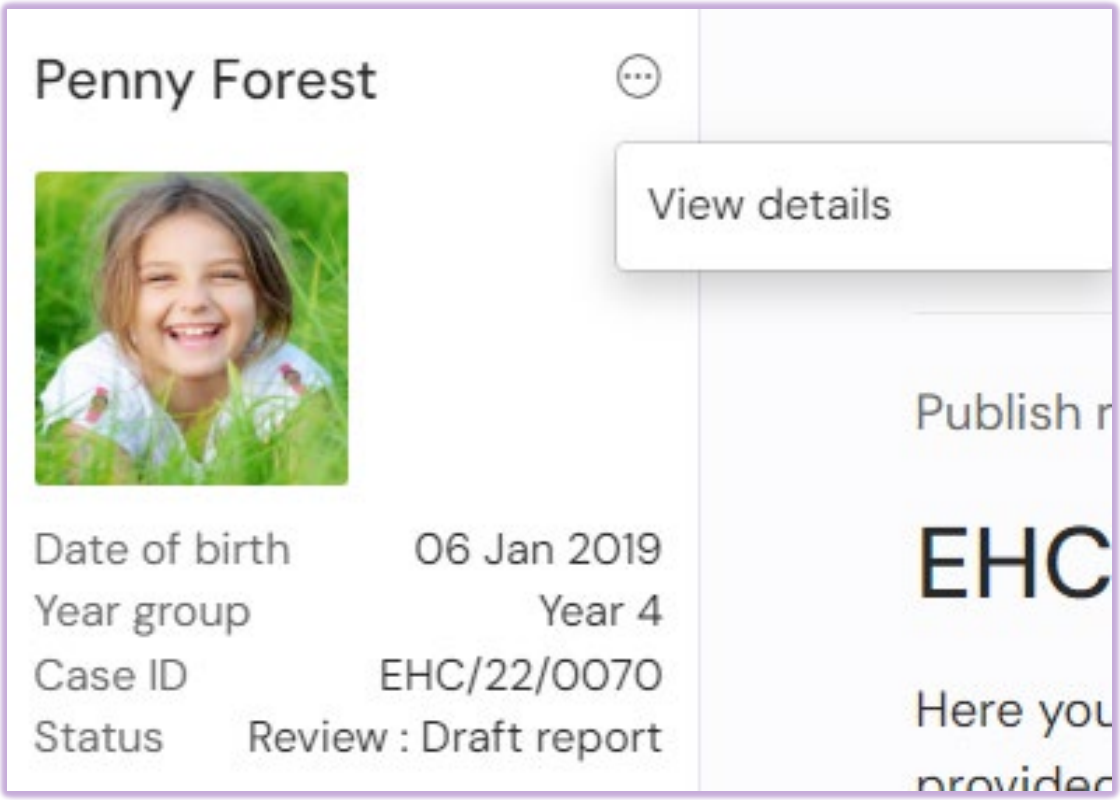


Details of the Case

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

The top section shows the Child/Young person's name, Date of Birth, Year group, Case ID and current status of the process as well as a photo if uploaded by a parent/carer/guardian or the case co-ordinator:

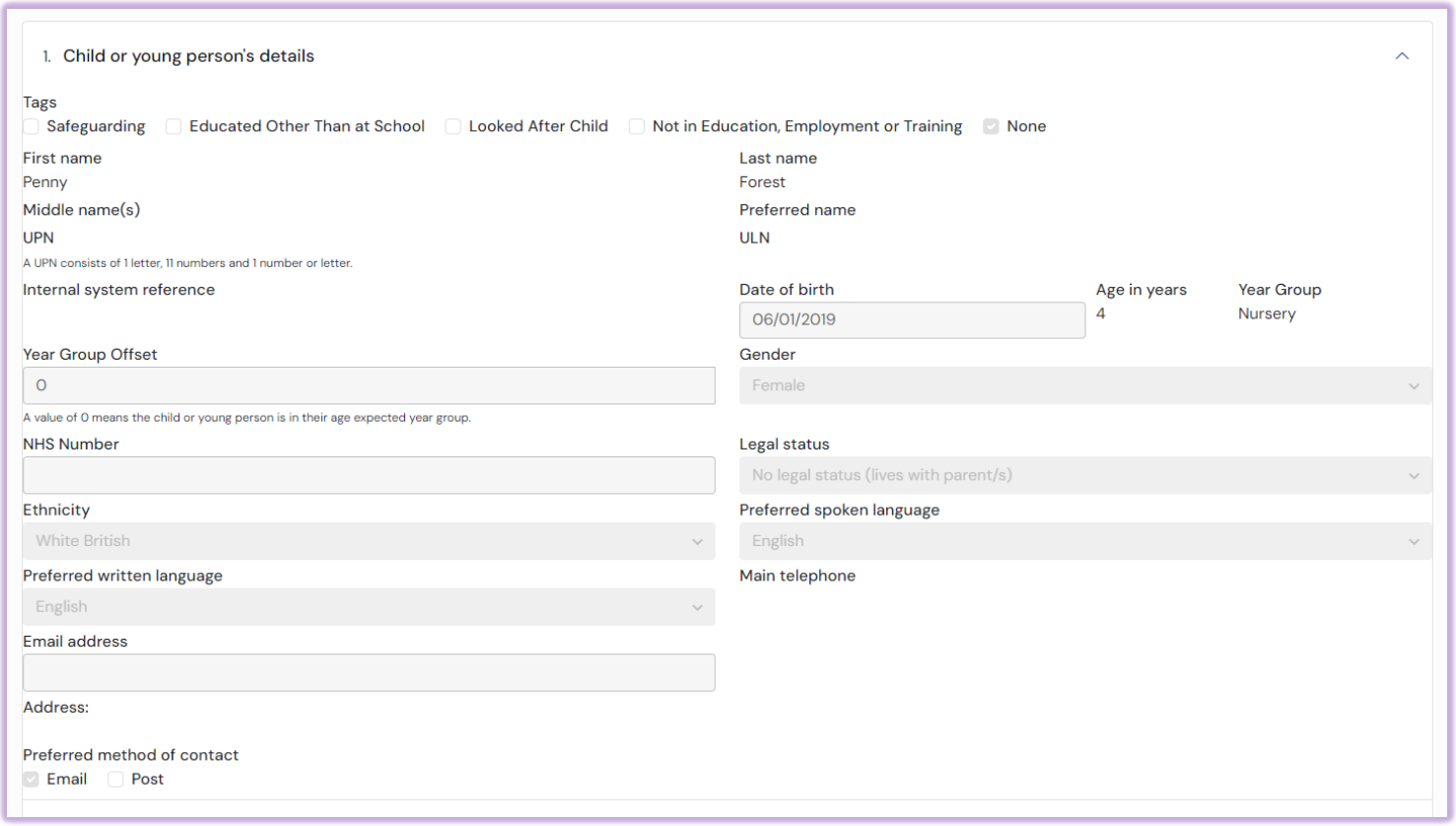
When you click the 3 dots in the top right and select 'Edit details', you will be given more information about the child record:



You will then see the following information:

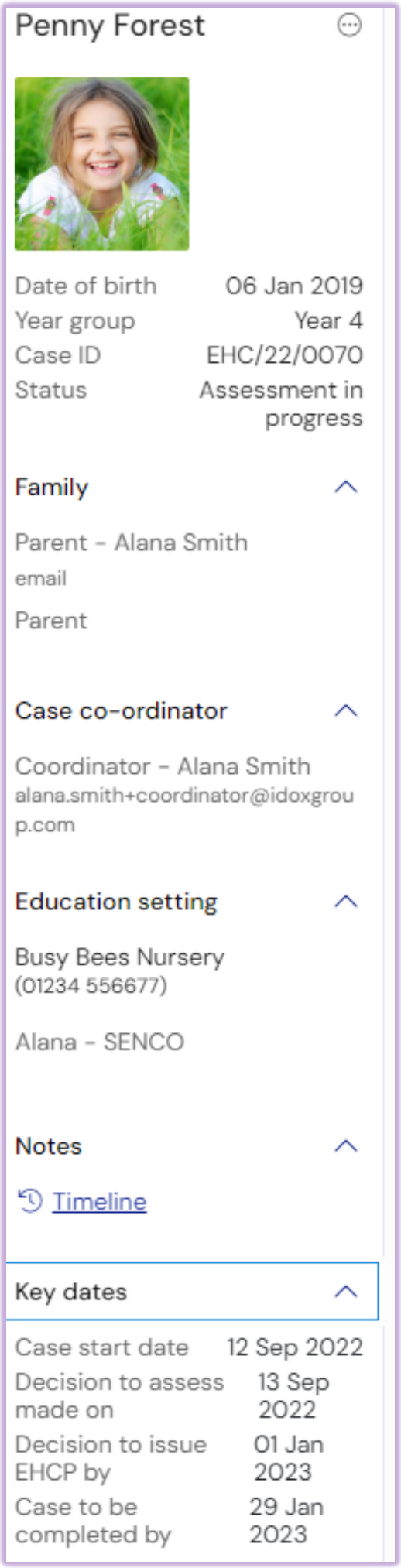
- Child or young person's details
- Child or young person's main contacts (family and involved professionals)
- Current Education Setting
- Previous Education Setting

This is what the screen will look like:



Scroll down to the bottom of the screen and click 'Cancel' to go back to the case view.

Below the child details, there are other sections for Family, Case Co-ordinator, Education Setting, Notes & Timeline and Key Dates:



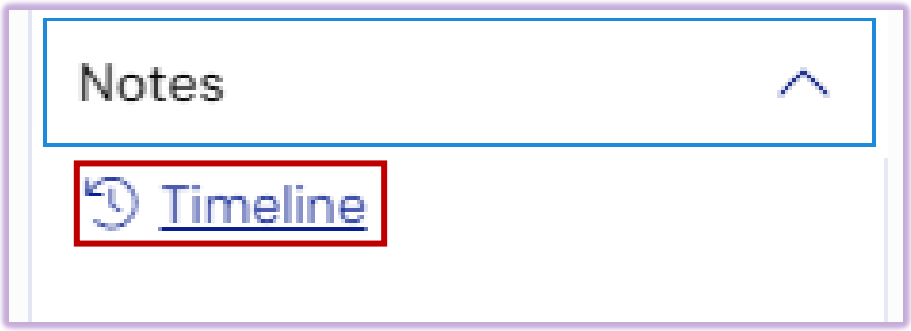
You can expand or collapse each section by clicking the section heading or the arrow at the end of each section header:

Family – This will show the details of any parent, carer, guardian, the young person or advocate who has access to the case

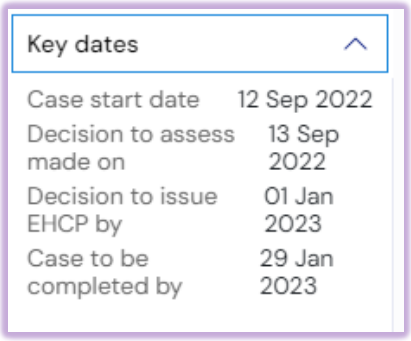
Case co-ordinator – This will show the case co-ordinator responsible for overseeing the process

Education Setting – This will show the details of the education setting which has access to the case

Notes – This is where you can view the case timeline. Click on View details to see this information:

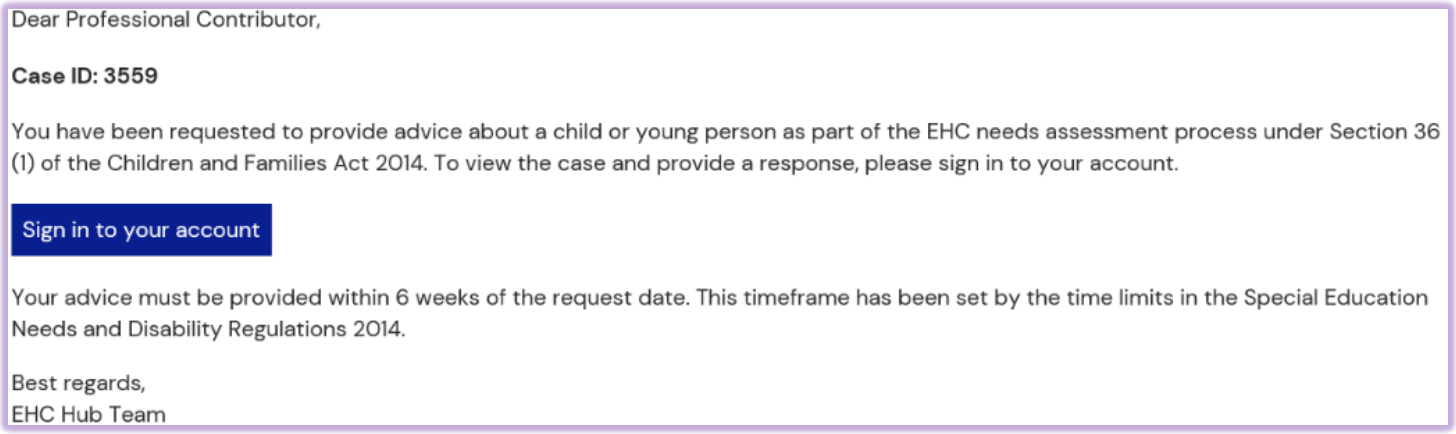


Key Dates – this will display the key dates in the process, based on the statutory date requirements. For example, it could show the start date of the case, when the decision to assess needs to be made and when the case needs to be completed:



How to contribute advice to an EHC needs assessment

If you have been requested to provide advice, you will receive an email to inform you of the request. The email will look similar to this:



Dear Professional 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.

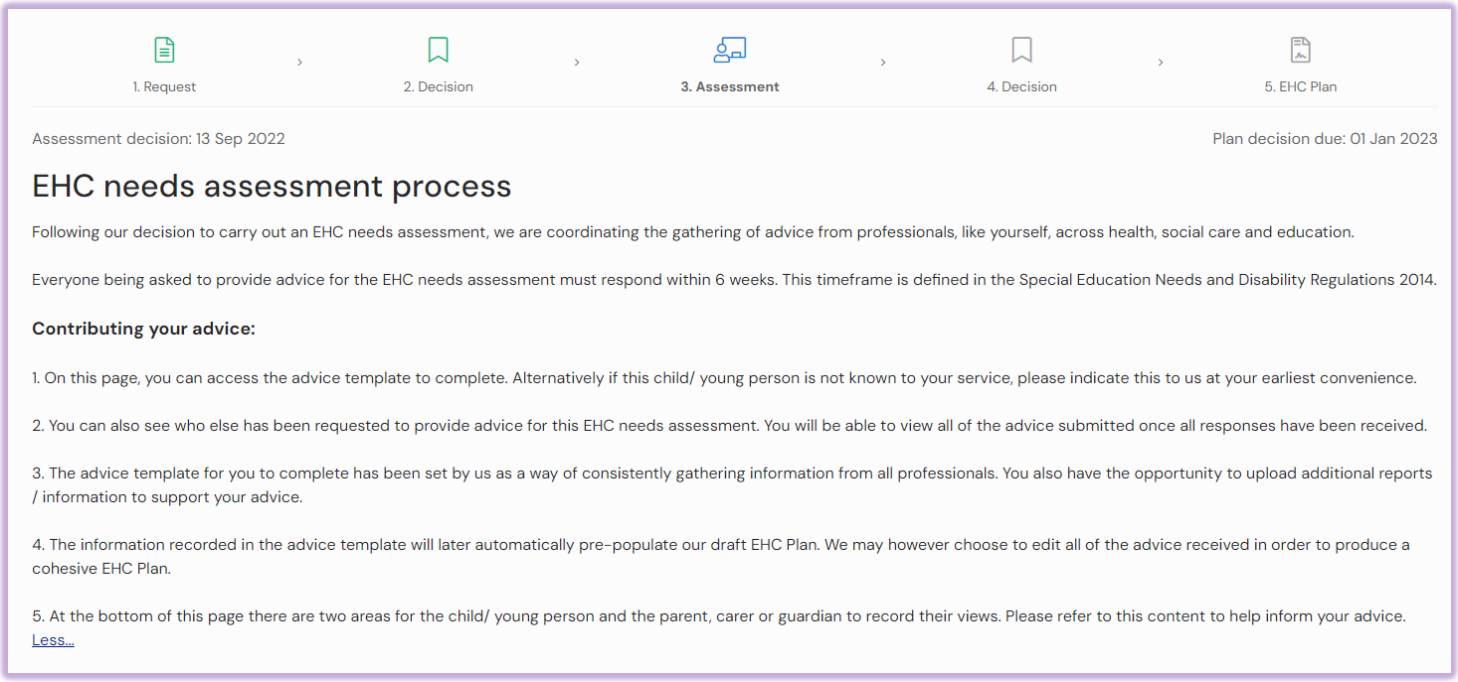
Sign in to your account

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

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

When you click on the case file, the case will open to the “Assessment” stage:



1. Request › 2. Decision › **3. Assessment** › 4. Decision › 5. EHC Plan

Assessment decision: 13 Sep 2022 Plan decision due: 01 Jan 2023

EHC needs assessment process

Following our decision to carry out an EHC needs assessment, we are coordinating the gathering of advice from professionals, like yourself, across health, social care and education.

Everyone being asked to provide advice for the EHC needs assessment must respond within 6 weeks. This timeframe is defined in the Special Education Needs and Disability Regulations 2014.

Contributing your advice:

1. On this page, you can access the advice template to complete. Alternatively if this child/ young person is not known to your service, please indicate this to us at your earliest convenience.

2. You can also see who else has been requested to provide advice for this EHC needs assessment. You will be able to view all of the advice submitted once all responses have been received.

3. The advice template for you to complete has been set by us as a way of consistently gathering information from all professionals. You also have the opportunity to upload additional reports / information to support your advice.

4. The information recorded in the advice template will later automatically pre-populate our draft EHC Plan. We may however choose to edit all of the advice received in order to produce a cohesive EHC Plan.

5. 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. Please refer to this content to help inform your advice.

Less...

You will see some information at the top of the page to assist you with providing your advice.

If you scroll down the page you will see your advice request.

If this child/ young person is not known to your service, this can be indicated on the advice template.

The assessment page provides access to complete your response and will also see who else has been asked to provide advice. You will be able to view all responses once your (or your team's) response has been submitted.

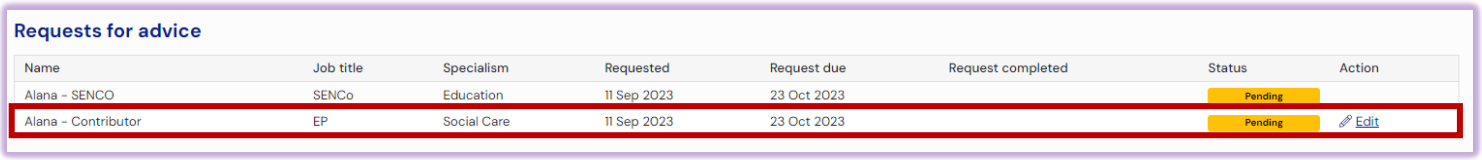
The advice template for you to complete has been set by the hub as a way of consistently gathering information from all professionals. You can also upload additional documents to support your advice.

The information submitted in the advice template will later pre-populate onto the draft EHC Plan should the local authority decide to issue one. They may however choose to edit all the advice received in order to produce a cohesive EHC Plan. Any changes made while drafting an EHC Plan will not change your original submission of advice at the assessment stage.

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.

Requests for Advice

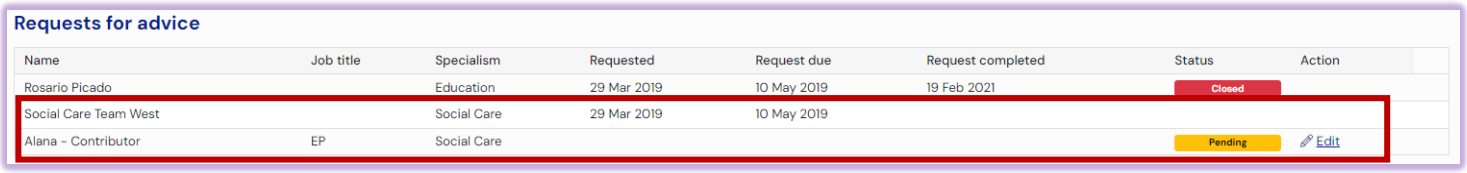
If you have been requested to provide advice, your name will be displayed in the list below:



Requests for advice

Name	Job title	Specialism	Requested	Request due	Request completed	Status	Action
Alana - SENCO	SENCo	Education	11 Sep 2023	23 Oct 2023		Pending	
Alana - Contributor	EP	Social Care	11 Sep 2023	23 Oct 2023		Pending	Edit

If the request for advice was originally allocated to a team, and the team manager has allocated the request to you as a member of that team, the request may look like this:

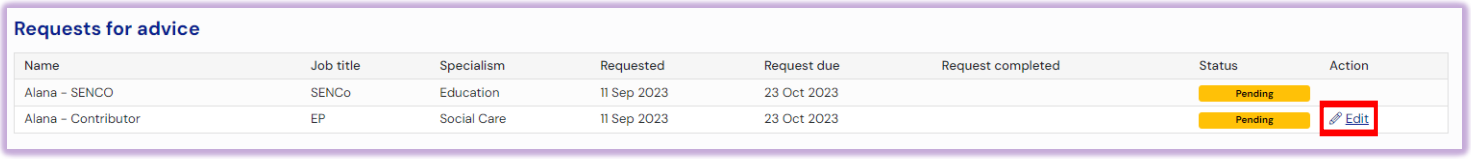


Requests for advice

Name	Job title	Specialism	Requested	Request due	Request completed	Status	Action
Rosario Picado		Education	29 Mar 2019	10 May 2019	19 Feb 2021	Closed	
Social Care Team West		Social Care	29 Mar 2019	10 May 2019			
Alana - Contributor	EP	Social Care				Pending	Edit

The date of the request and the date your response is due will be displayed, as well as the status of the request for advice.

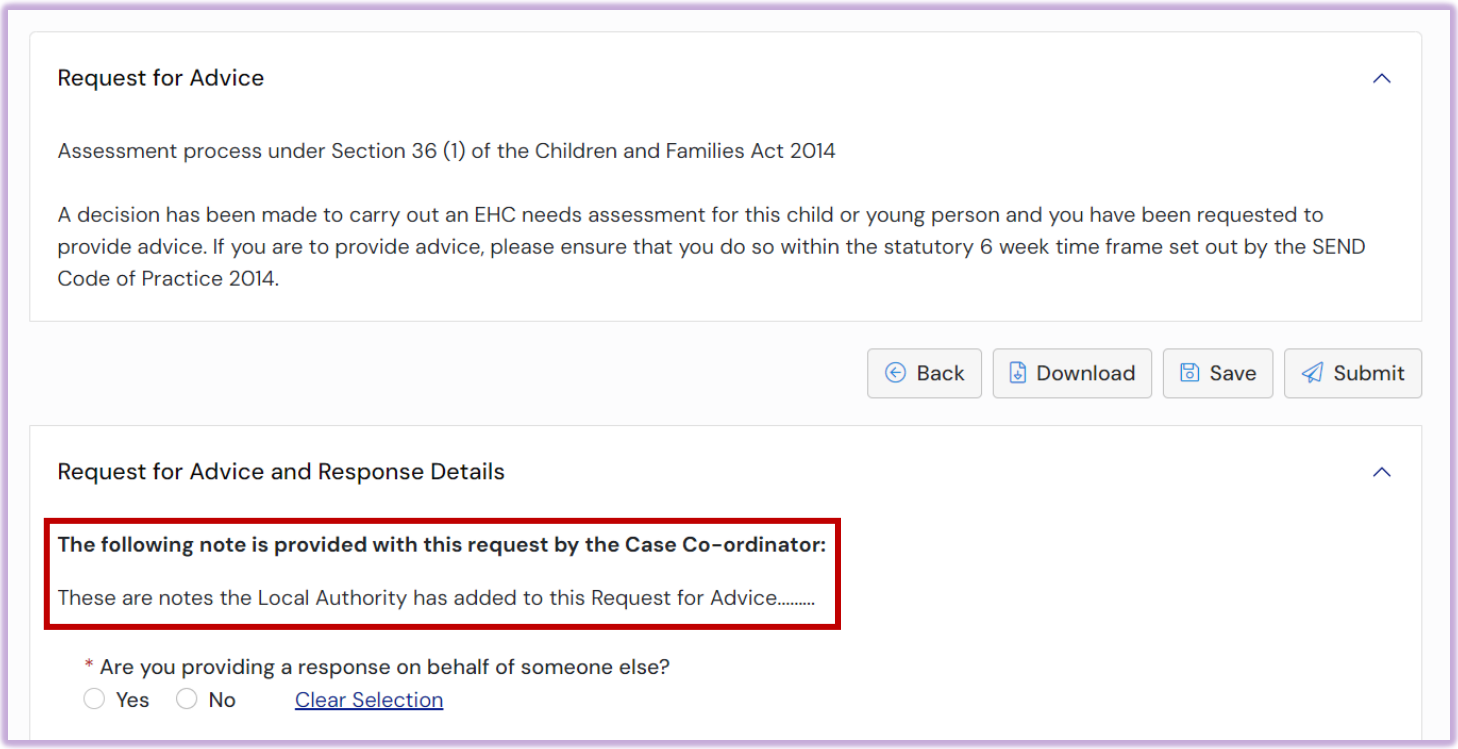
To enter your advice, click 'Edit':



Requests for advice

Name	Job title	Specialism	Requested	Request due	Request completed	Status	Action
Alana - SENCO	SENCo	Education	11 Sep 2023	23 Oct 2023		Pending	
Alana - Contributor	EP	Social Care	11 Sep 2023	23 Oct 2023		Pending	Edit

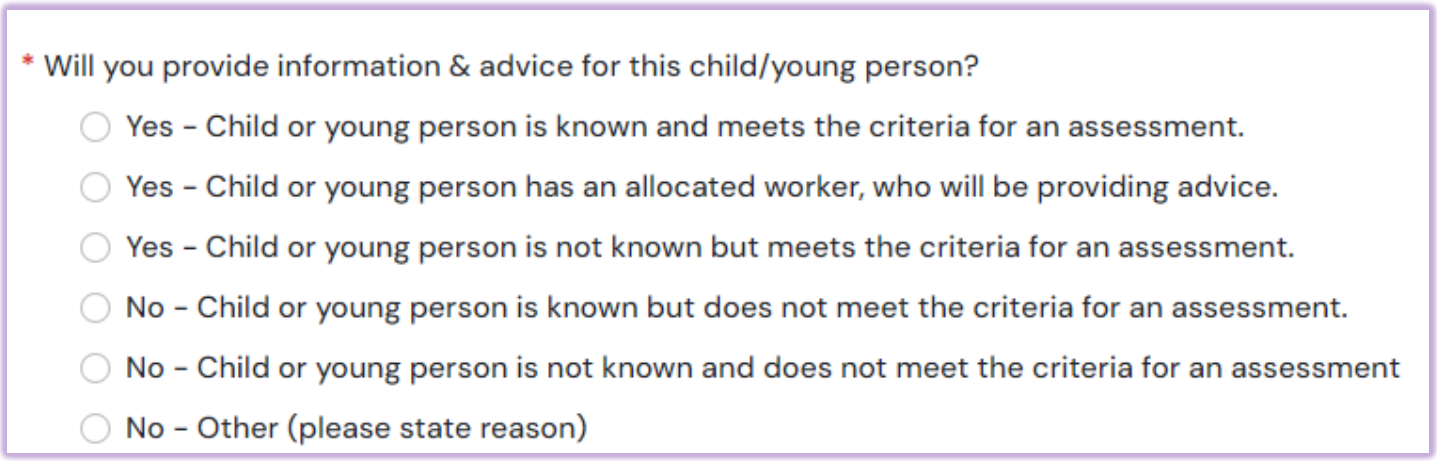
You will see the following page, which will show any notes added to your request for advice by the local authority:



You will need to specify if you are providing information on behalf of someone else or not; “Yes” or “No”.

If you are providing advice on behalf of someone else, you will need to enter their name and job title/role. If you are not providing advice on behalf of someone else, these details will be added for you from your user profile.

Indicate if information will be being provided, and the reason for this answer (Details). To select your answer, click on the appropriate radio button:



If your response is part of a request for advice made to a team, this part may not appear to you or has already been completed by your manager.

Below this, there are free text fields for you to provide background details.

The first section has 5 fields to be completed:

- When did the child or young person first come into contact with your organisation?
  (This field is mandatory and must be completed before the advice can be submitted)
- Details of any discussion held between the child or young person and your organisation *(if relevant)*
- Details of any discussion held between the parent(s) or carer(s) and your organisation *(if relevant)*

- What has your organisation put in place already to support the child or young person's needs? *(This field is mandatory and must be completed before the advice can be submitted)*
- What has been the effect of any support or strategies already put in place by your organisation? *(This field is mandatory and must be completed before the advice can be submitted)*

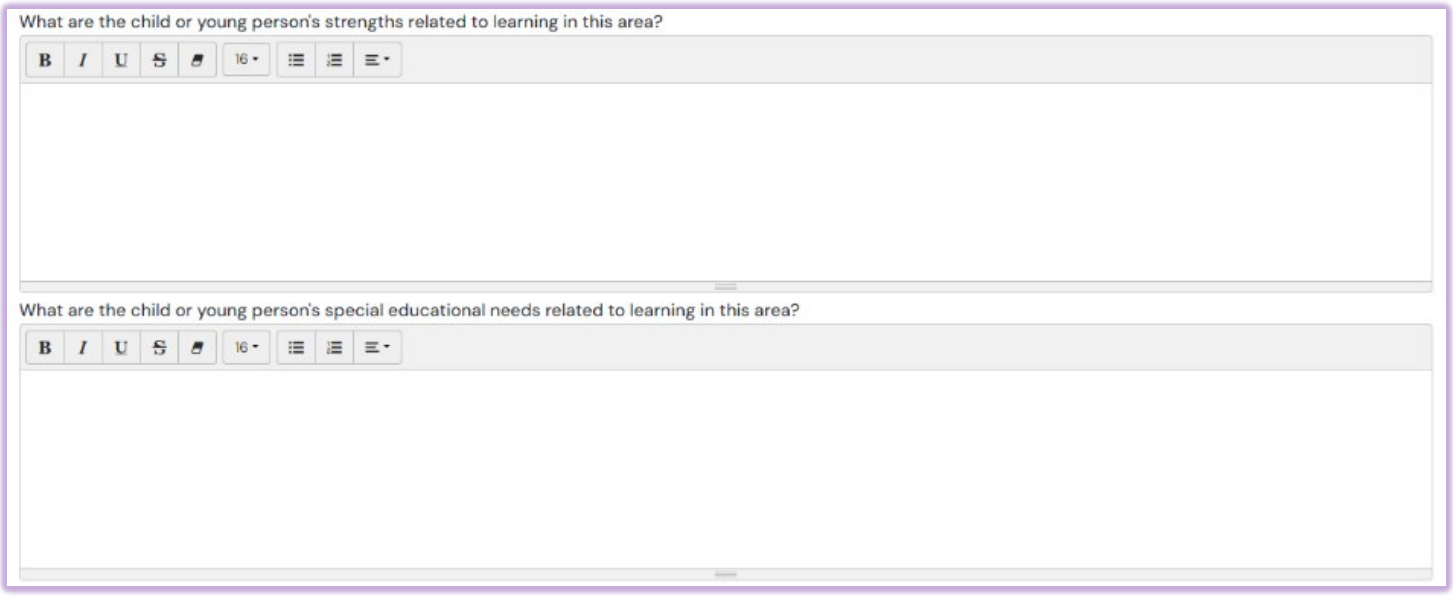
Below that, there are 6 more sections, one for each area of need:

Only complete sections which are relevant to your assessment of the child or young person's Special Educational Needs – leaving any advice area empty indicates to the local authority that you have not identified it as an area of need.

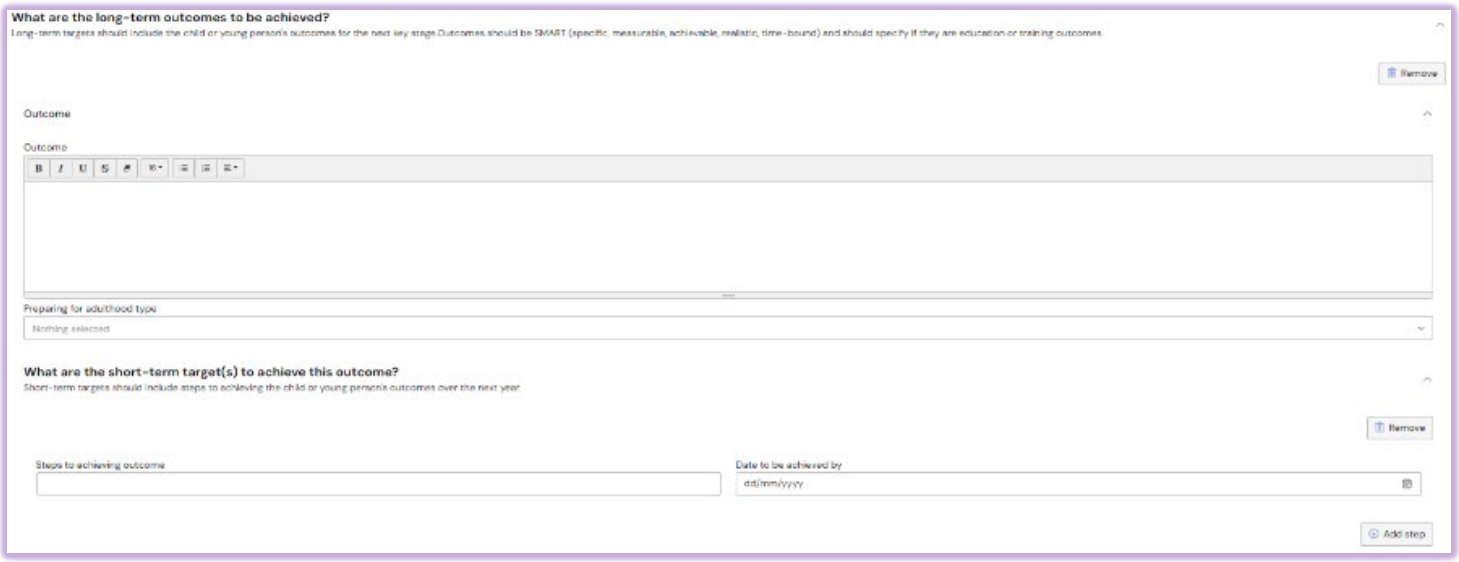
There are certain fields that are mandatory. These fields will be indicated with a red asterix. You will not be able to submit your advice unless these fields have been completed.

Click the green arrow beside the area of need you would like it edit, each section has the same layout and structure.

<u>Strengths and Needs</u>

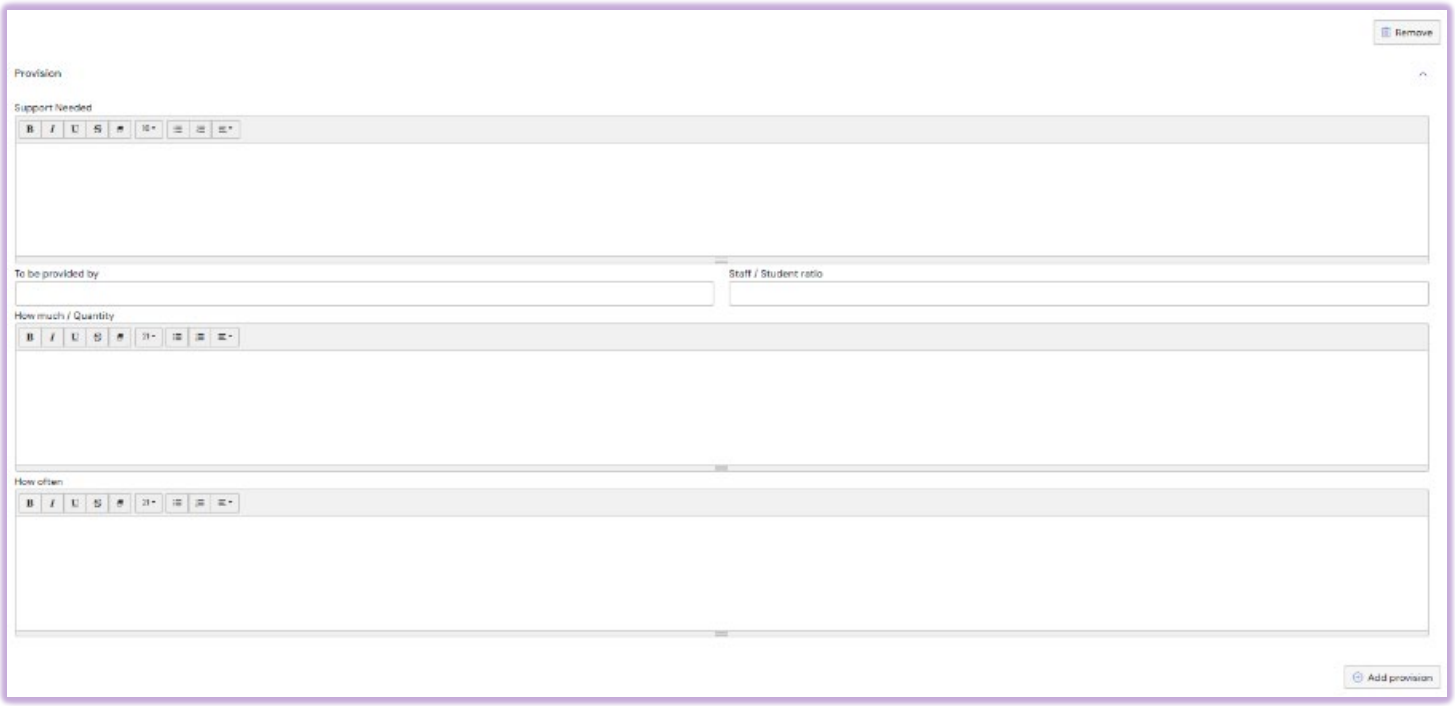


Outcomes, Steps and Provisions



If you want to add more steps, click ‘Add steps’.

If you want to add more outcomes, click ‘Add outcome’ at the bottom of the screen.



If you want to add more provisions, click ‘Add provision’.

Outcome - Enter the details of the outcome in the text field.

Preparing for adulthood type – Select the relevant type(s) from the pick list.

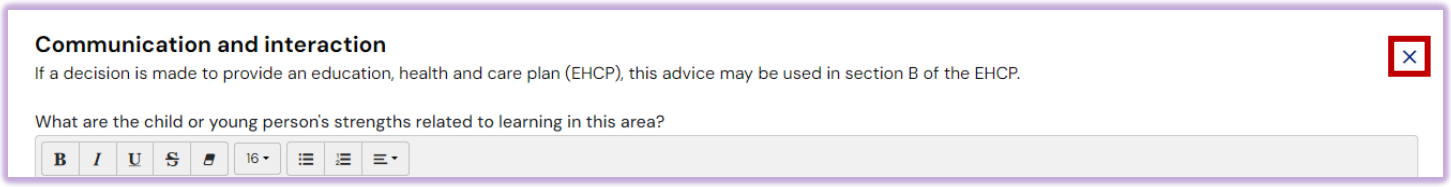
Steps – to add a step, click ‘Add step’. Enter the step to achieving outcome and the date to be achieved by

Provision – Click ‘Add provision’ button.

There is no limit to the number of Outcomes, Steps or Provision that can be added.

Click ‘Save’ at the top of the page to save the information you have entered.

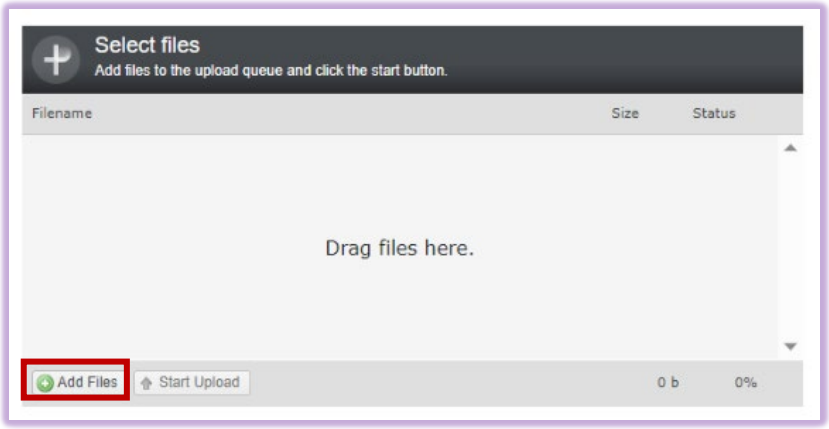
Click the X button when you are finished with the section, this will take you back to your advice request home page and you can select another area of need to edit:



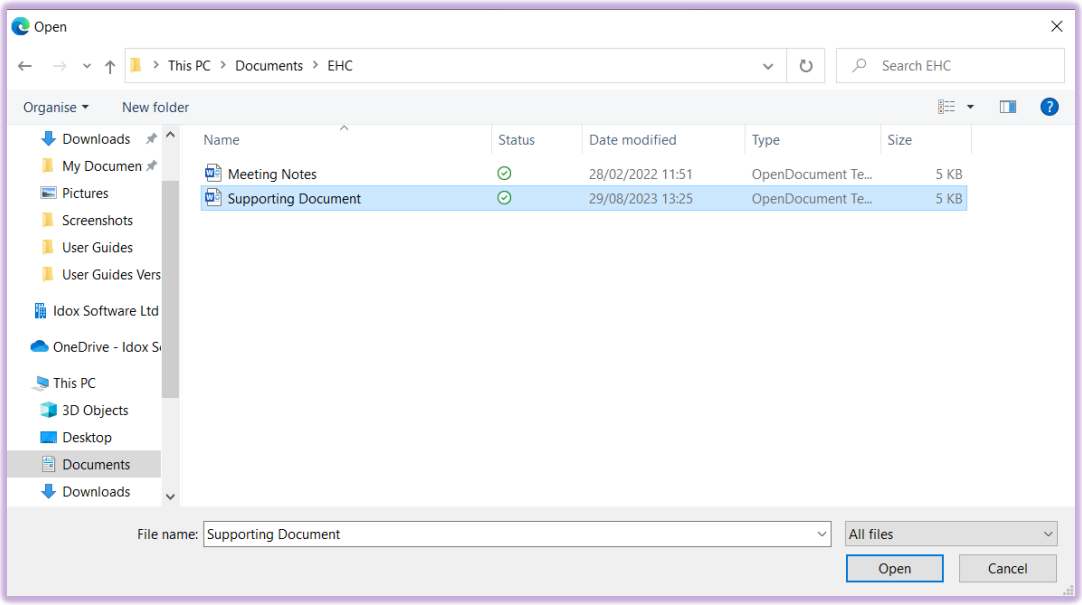
Documents

Any additional information to support the advice can be uploaded here:

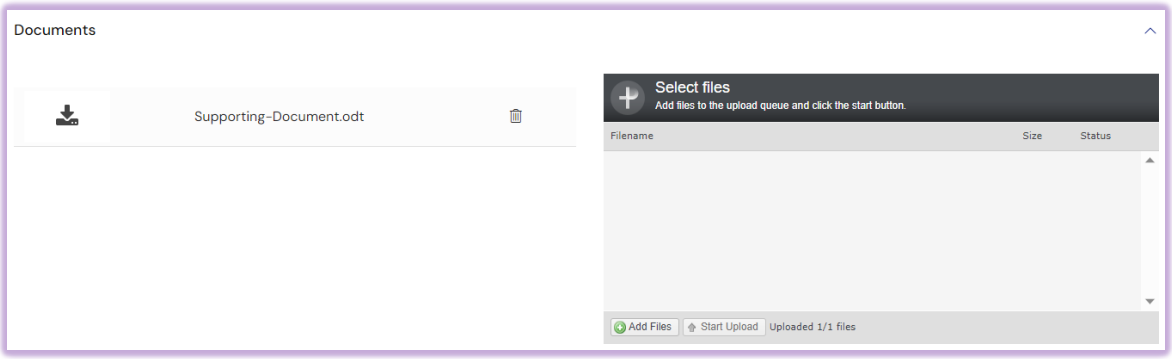
If you want to add any documents, click 'Add Files':



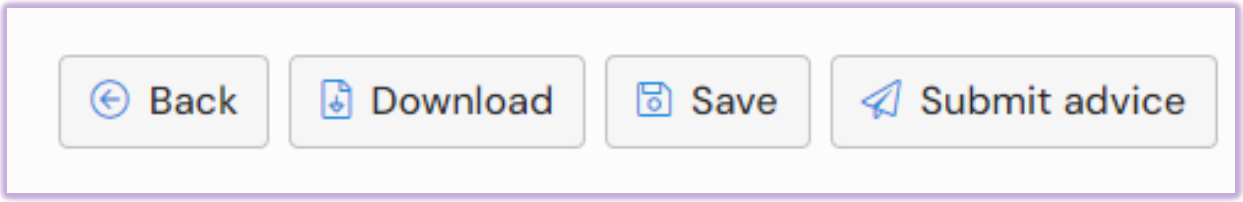
You will then need to navigate to the file wherever it is saved on your PC:



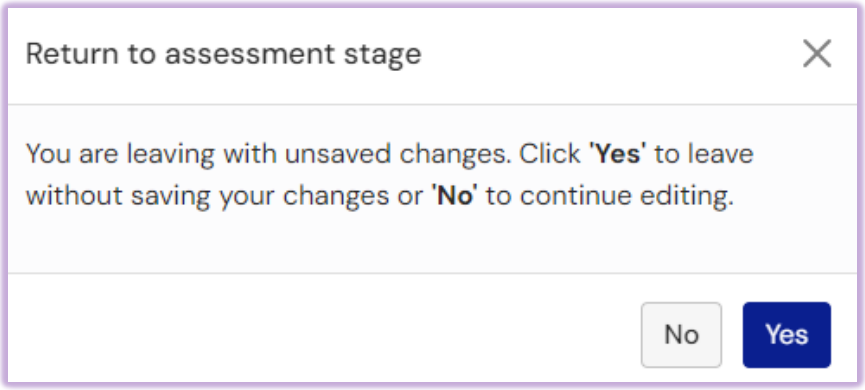
Click 'Open' and the file will be uploaded. The uploaded file will be displayed:



At the top of the screen, there are four options:



Back - This will return you to the assessment page (please make sure changes are saved before returning to the assessment page – a warning message will be displayed if there are unsaved changes):



Download – it is possible to download a copy of your response as a PDF document. When you click on download, the file can be saved to your device

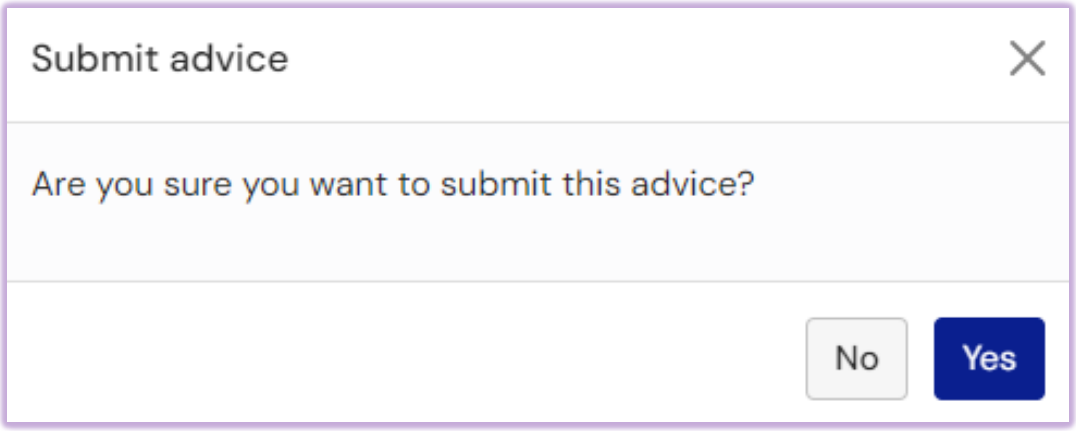
Save – allows you to save any information you've entered

Submit advice – click this when you have entered all your advice and are ready for this to be made available to view

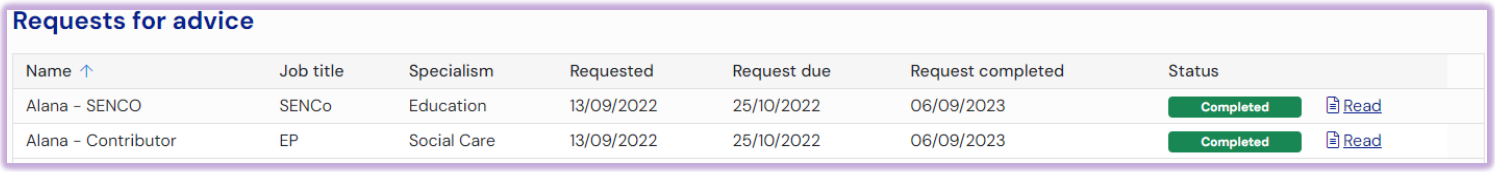
Submitting Advice

When you are ready to submit your advice, click 'Submit advice'.

You will be asked to confirm you wish to submit the advice – once submitted, your response cannot be changed:



When you click Yes, you will be taken to the Assessment page and the display of the Requests for advice will be updated and will change the status from 'Pending' to 'Completed':



Requests for advice

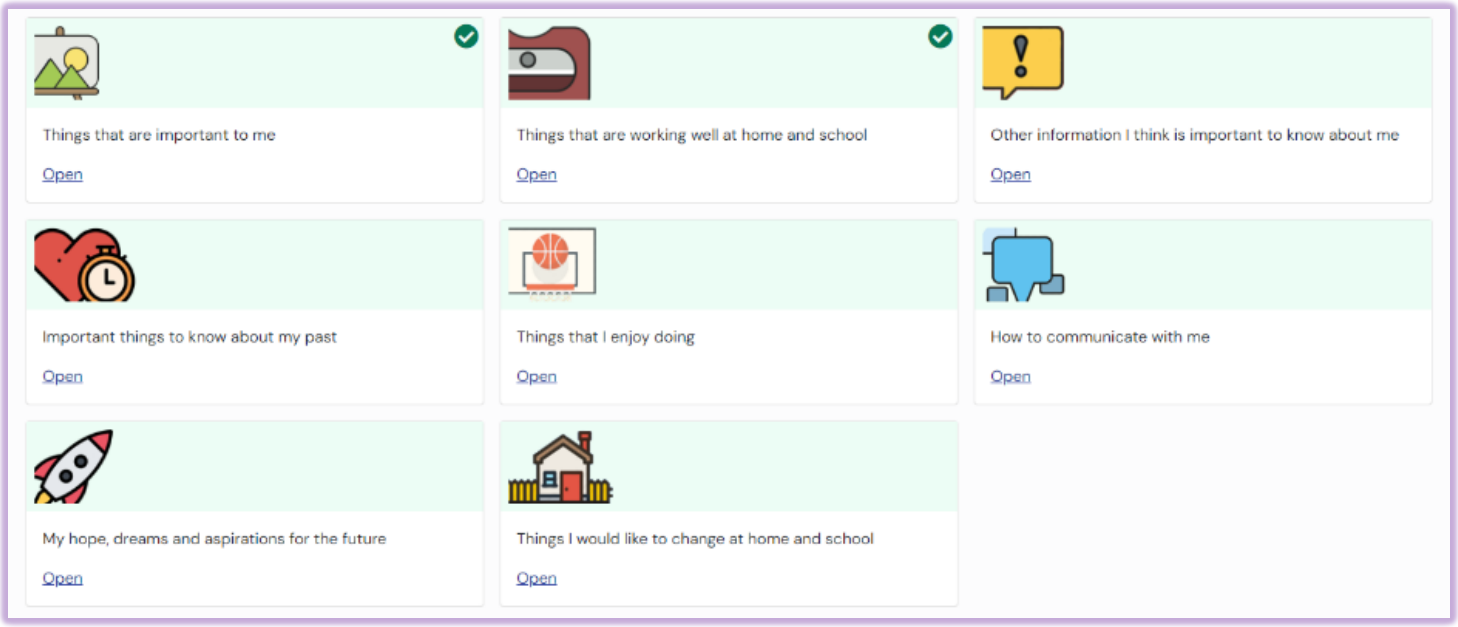
Name	Job title	Specialism	Requested	Request due	Request completed	Status	
Alana - SENCO	SENCo	Education	13/09/2022	25/10/2022	06/09/2023	Completed	Read
Alana - Contributor	EP	Social Care	13/09/2022	25/10/2022	06/09/2023	Completed	Read

Having submitted advice towards the assessment, you will able to read all other professional advice that has been submitted. Click ‘Read’ beside advice you wish to view, you will also be able to download any submitted advice.

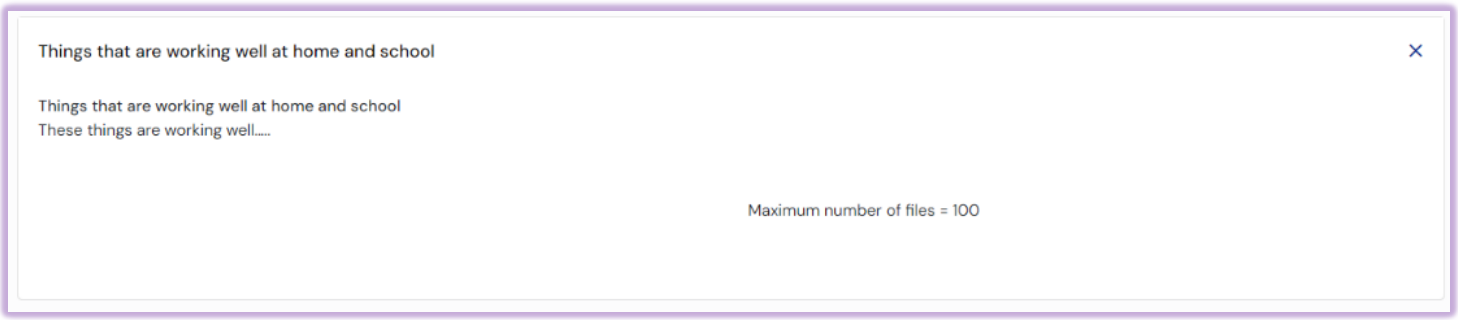
If there is an error in your submission, and the case remains at the assessment stage, it is possible for the case co-ordinator to re-open your response. However, please note that the request completed date will reflect the date of re-submission (if it is different to the date on which you originally submitted your response).

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:

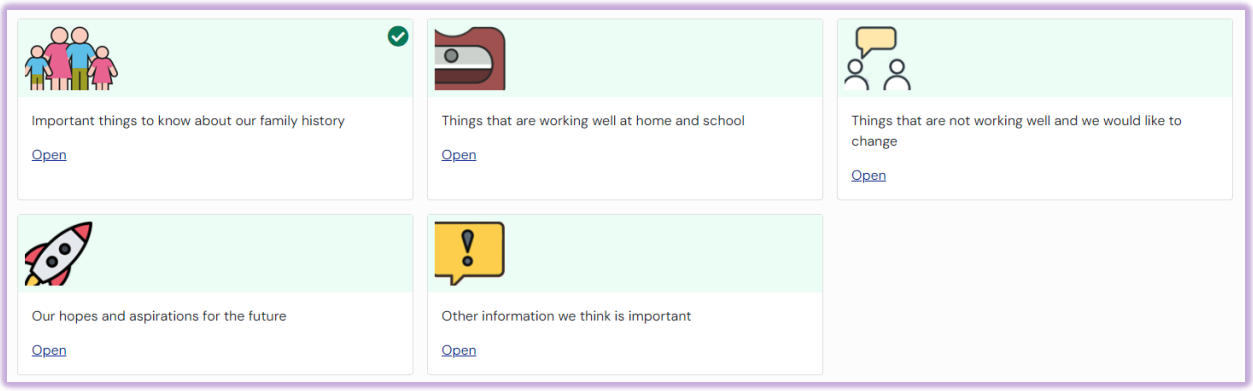


A green tick in the top right-hand corner of the section means information has previously been entered this section. To view that information, click ‘Open’ and it will be displayed:



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:



A green tick in the top right-hand corner of the section means information has been added or changed as part of this review. To view that information, click ‘Open’ and it will be displayed:

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