

Education, Health and Care (EHC) Hub Parent and Carer Guide

• The Assessment Process

Classification: Public

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Document Control

Version	Changes	Author	Date
V1.0	Created	Kristine Neal	July 2025

About this document

This document is for parents, carers and young people to provide instructions about the [Derbyshire County Council's EHC Hub](#), covering:


- Viewing a Request for Assessment
 - Status of the process and case details
- How to contribute to a request
 - Sections of the request and what can be edited
- Decision to assess
- Contributing to an assessment (child and parent views)
- Requests for advice from professionals

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Viewing the Request for Assessment

Once you have selected the child/young persons name you will be able to click 'view request':



Rogers, Barney
Request date: 8th Aug 2023
Decision due: 18th Sep 2023

 We have received a request for an EHC needs assessment relating to Barney.


What does this mean?

What should I be doing right now?

What happens next and when?

View request

The following page will appear:



Barney Rogers
Date of birth 10 Jan 2017
Year group Year 6
Reference EHC/23/0140
Status Request for assessment (information gathering)
Family
Test Parent 2 email
Case co-ordinator
Coordinator – Alana Smith
coordinator@idoxgroup.com
Education setting
Greenhill School (01234 887766)
Alana – SENCO

1. Request

2. Decision

3. Assessment

4. Decision

5. EHC Plan


Case start date: 08 Aug 2023

Case to be completed by: 25 Dec 2023

Request for an EHC needs assessment
Test The EHC process begins with a request for an assessment of a child or young person’s special educational needs. The local authority will make a decision on whether to proceed with a needs assessment or not.

If a decision is made to carry out a needs assessment, they will then decide whether the child or young person needs an Education, Health and Care Plan.
[Less...](#)

Consent

 Should you wish to withdraw your consent, or change/provide further details of any limitations, please contact the Local Authority directly to discuss.

Save

Status of the Process

The top of the screen will show what stage of the process the EHC plan is currently at, there will also be some key date information which will update as the case progresses through the stages.

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:

1. Request

2. Decision

3. Assessment

4. Decision

5. EHC Plan


Case start date: 08 Aug 2023

Case to be completed by: 25 Dec 2023

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 Family, Case Co-ordinator, Education Setting, Notes and Key Dates. You can expand each section to view information on it by clicking on the arrow:

Barney Rogers



Date of birth10 Jan 2017

Year groupYear 6

ReferenceEHC/23/0140

StatusRequest for assessment (information gathering)

Family

Case co-ordinator


Education setting

Notes

Key dates

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:

Barney Rogers



Date of birth10 Jan 2017

Year groupYear 6

ReferenceEHC/23/0140

StatusRequest for assessment (information gathering)

Family

Test Parent 2 email

Case co-ordinator

Education setting

Notes

Key dates


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 – 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:

Notes

 [Timeline](#)

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:

Key dates

Case start date

08 Aug 2023

Decision to assess by

18 Sep 2023

Case to be completed by


25 Dec 2023

How to contribute to a request

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

Barney Rogers



Date of birth10 Jan 2017

Year groupYear 6

ReferenceEHC/23/0140

StatusRequest for assessment (information gathering)

Family

Case co-ordinator

Coordinator - Alana Smith

Education setting

Notes

Key dates

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:

Save

Email

Post

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

Remove

Full name

Maggie

Relationship or role

Mother

Organisation (if applicable)

Preferred language

Nothing selected

Telephone

Email

Address:

Postcode Search

Search

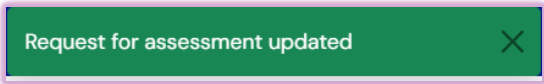
Has parental responsibility

Yes

No

[Clear Selection](#)

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



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. If the request was created by someone else, they should have already sought your consent and indicated that in this space.

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.

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.

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.

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

Remove

Full name

Maggie

Relationship or role

Mother

Organisation (if applicable)

Preferred language

Nothing selected

Telephone

Email

Address:

Postcode Search

Search

Has parental responsibility

☐ Yes

☐ No

Clear Selection

Preferred method of contact

☐ Email

☐ Post

Add

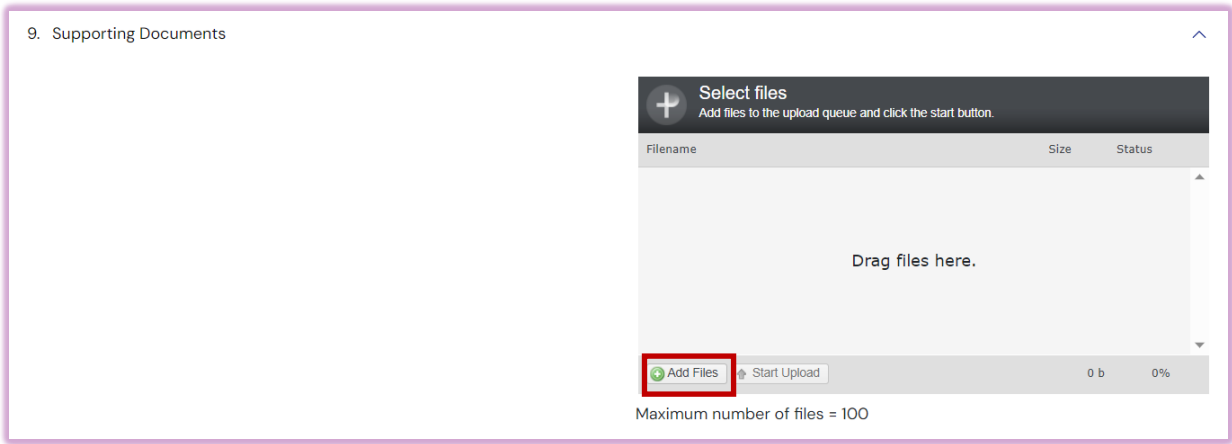
Details of the child or young person’s current education settings(s) - If any of these details are incorrect, you will need to contact the case co-ordinator to get them updated. Click [here](#) for details on how to find out the contact information for your case co-ordinator.

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.

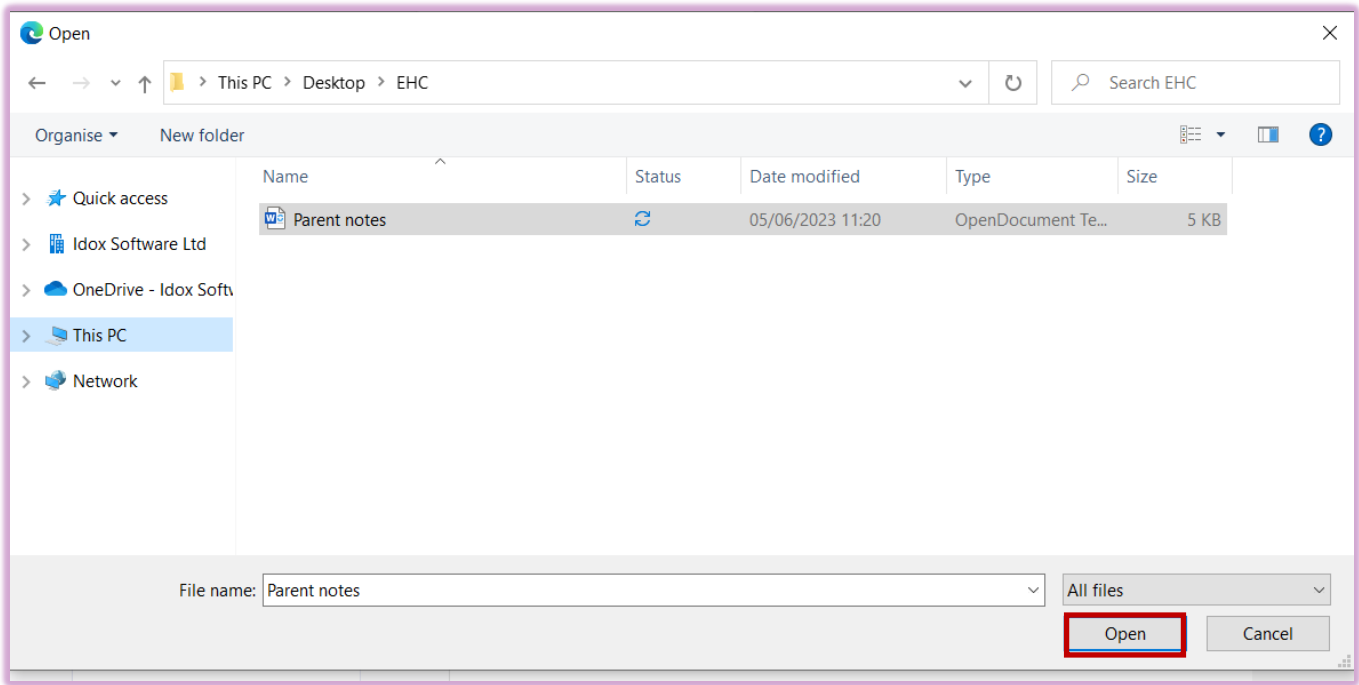
Important information about the child or young person - Any information entered when the original request for assessment was made will be displayed here but can be amended or added to here.

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

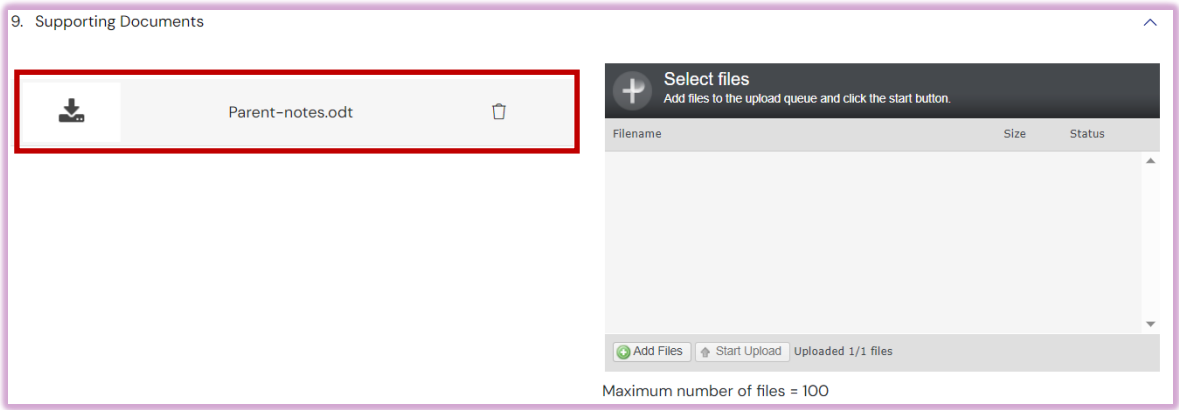
Supporting Documents - If you want to add any relevant supporting documents, click ‘Add Files’:



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




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



Click ‘Save’ at the top of the request page.


Decision to Assess Pending

Once all the information for the decision on the assessment has been gathered by the Local Authority, the parent dashboard will show that a decision to assess is pending:



Childs, Robbie

Request date: 16th Sep 2015
Decision due: 27th Oct 2015



A decision on whether or not to proceed with an EHC needs assessment for Robbie is pending.

What does this mean?

What should I be doing right now?

What happens next and when?

View request

If you view the request, this message will appear to say that the decision is pending:



Decision Pending

A decision to proceed to a needs assessment or not is pending.

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

Assess Decision

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 Alana Smith,


Case ID: EHC/21/0011

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 sign in to your account.

[Sign in to your account](#)


Best regards,
EHC Hub Team

When you sign into the Hub, the case status will look like this:



Green, Nora

Request date: 17th Aug 2023
Decision due: 6th Dec 2023



An EHC needs assessment for Nora is in progress.


What does this mean?

What should I be doing right now?

What happens next and when?


[View assessment](#)

Or



Yel, Henry

Request date: 15th Aug 2023
Decision date: 29th Aug 2023



We have decided not to proceed with an EHC needs assessment for Henry.

What does this mean?

What should I be doing right now?

What happens next and when?

[View decision](#)

If the decision has been taken not to proceed with an EHC Needs Assessment, you are able to view the reason for the decision by clicking 'View decision', and will be able to view and download the decision letter with details about the decision:

Decision on whether to carry out an EHC needs assessment

Test The local authority have up to 6 weeks from the date the original request was made to gather further information and to make a decision on whether to carry out an EHC needs assessment or not.

[Less...](#)

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

2023 August 29

Letter

[Download](#)

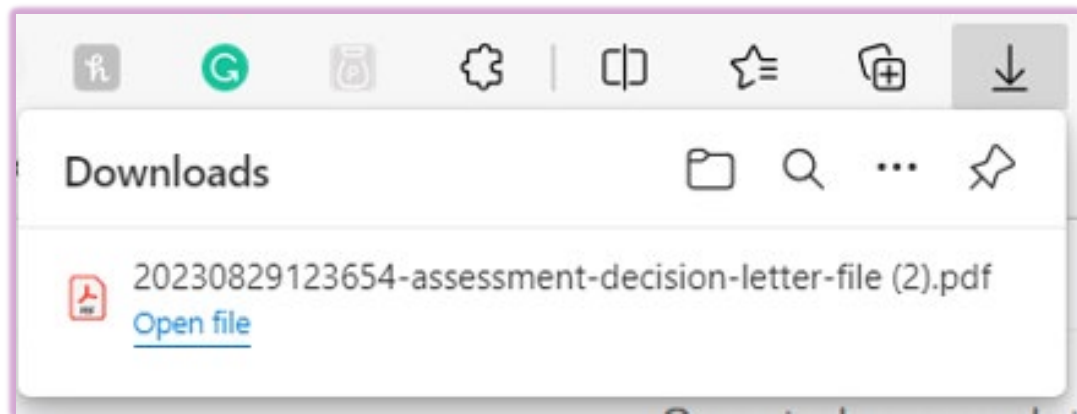
Reason for decision

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 Local Authority originally say ‘no’ assessing the child/young person, they can change their decision by recording a second decision. You will be notified by email, and the decision screen will show the second decision at the top and the previous decision at the bottom, it will look like this:

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

Decision

Proceed with EHC Needs Assessment


Agreement/order date

11 Sep 2023

Decision published date


12 Sep 2023

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.

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


20 Jan 2023

Letter

 [Download](#)

Reason for decision

fghrf

 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.

How to contribute to an assessment

If the decision has been taken to proceed with an EHC needs assessment, click ‘View assessment’, you will be provided with information about the EHC needs assessment process:

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. [Less..](#)

There are two areas where you can contribute to the EHC needs assessment. These are About (child/young person name) and Parent/Carer views.

About (Child/young person name)

The section is all about 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 can be completed:


- 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

Click ‘Open’ on each section to view or enter information:

About Nora


This section is about what is important to the child or young person. Where possible, this section should be completed by the child or young person themselves. Where support has been given or where it has been completed on behalf of the child or young person, it should be made clear in each section whether the child has directly quoted the statements or if they have been summarised.

The content from this section will later be included in Section A of the EHCP if the Local Authority decide to issue one.




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

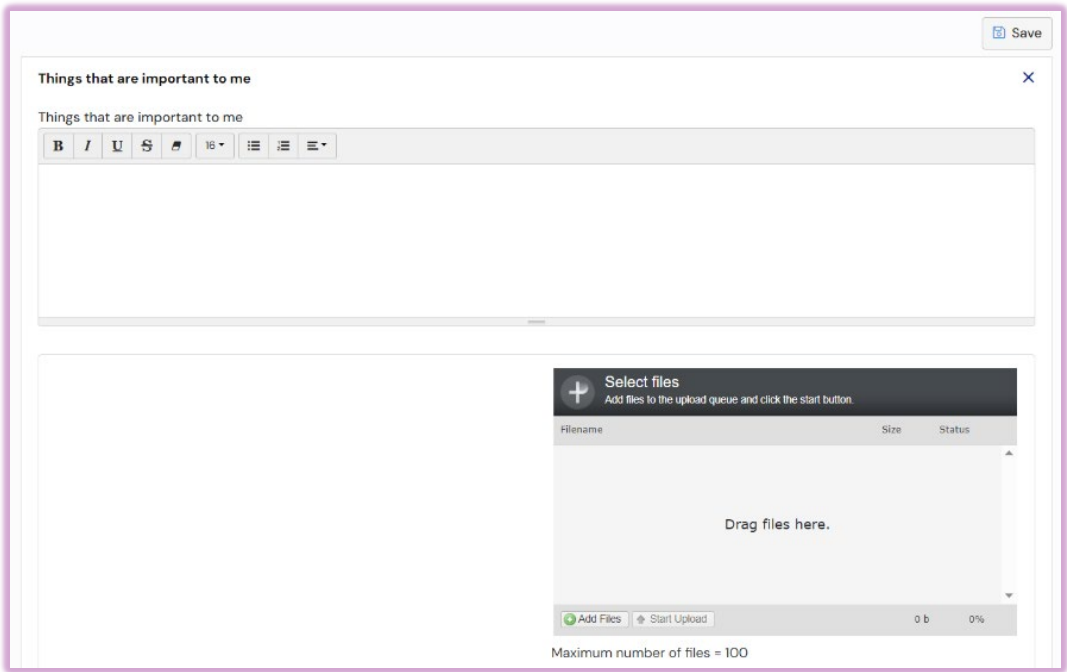
[Open](#)



Things I would like to change at home and school

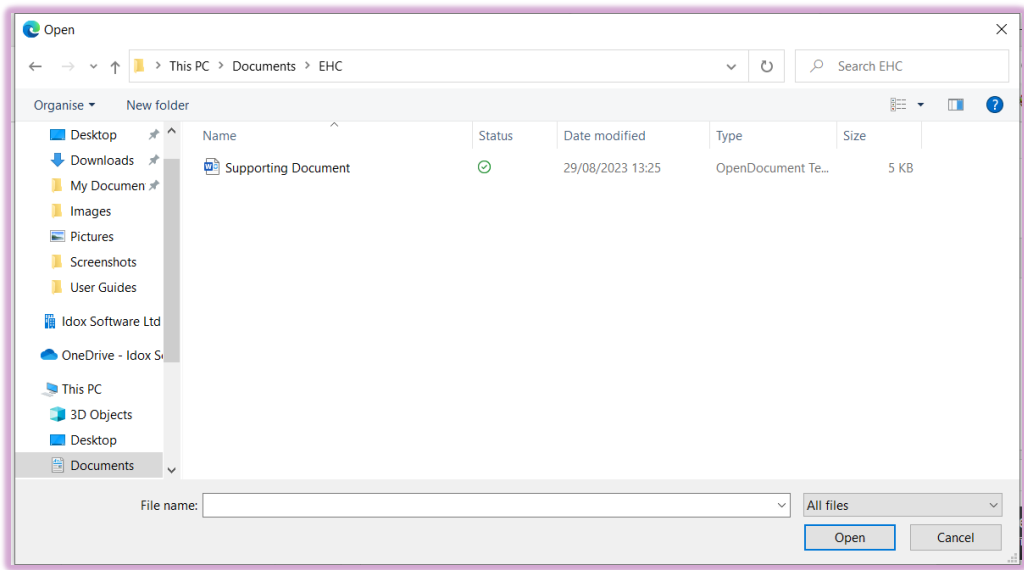
[Open](#)

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

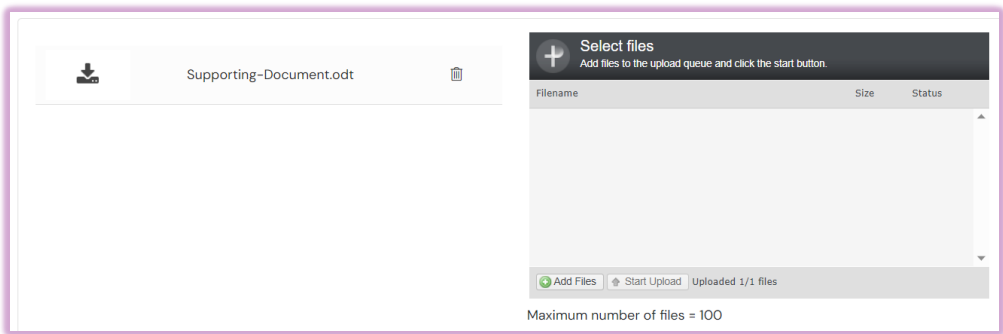


Click [here](#) for more information on using free text fields.

There is a section to add files. 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 to save the information:

Save

Things that are important to me
×

Things that are important to me

B
I
U
~~S~~

16 ▾

Once you have completed the information and saved it, click the X button in the top right corner and you will be taken back to the main page to choose which section you want to complete next:

Things that are important to me
×

Things that are important to me

B
I
U
~~S~~

16 ▾

Parent, Carer or Guardian'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 that can be completed:

- 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 Click 'Open' on each section to view or enter information:

Nora's Parent, Carer or Guardian's Views

This section is for the child or young person's parent's / carer's to give their views. The content from this section will later be included in Section A of the EHCP if the Local Authority decide to issue one.

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

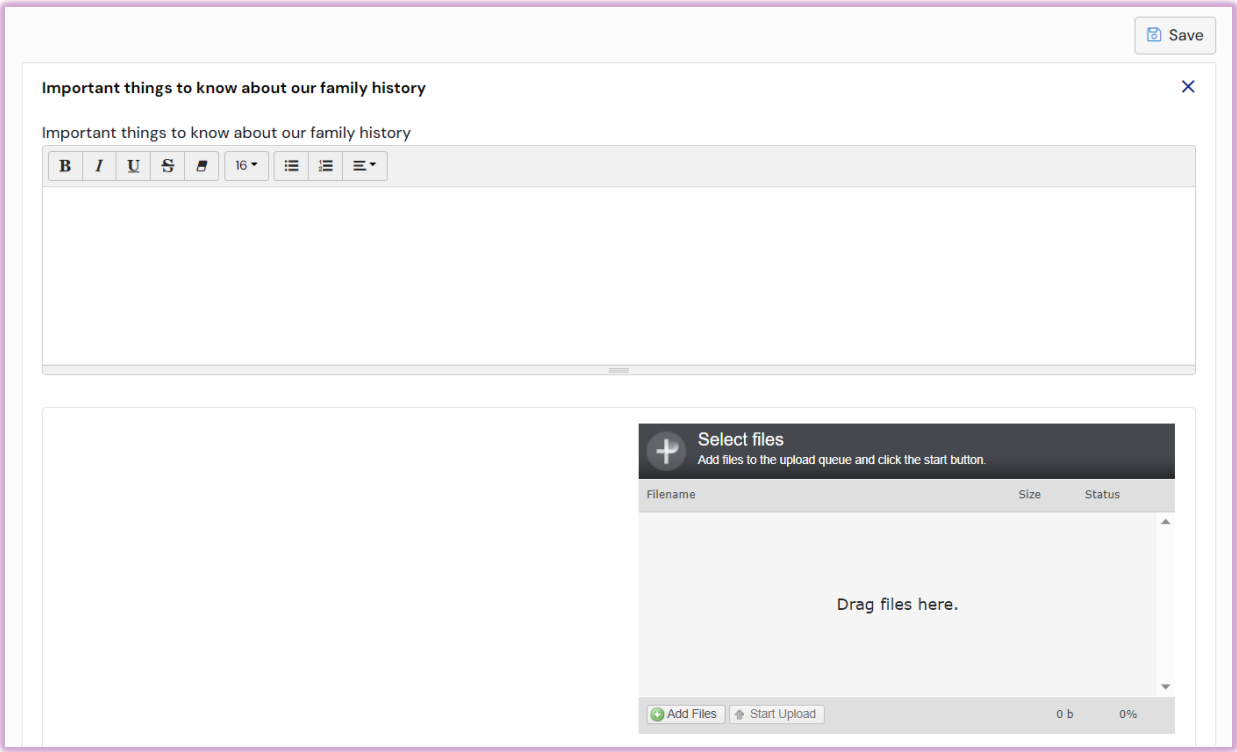
Our hopes and aspirations for the future

Open

Other information we think is important

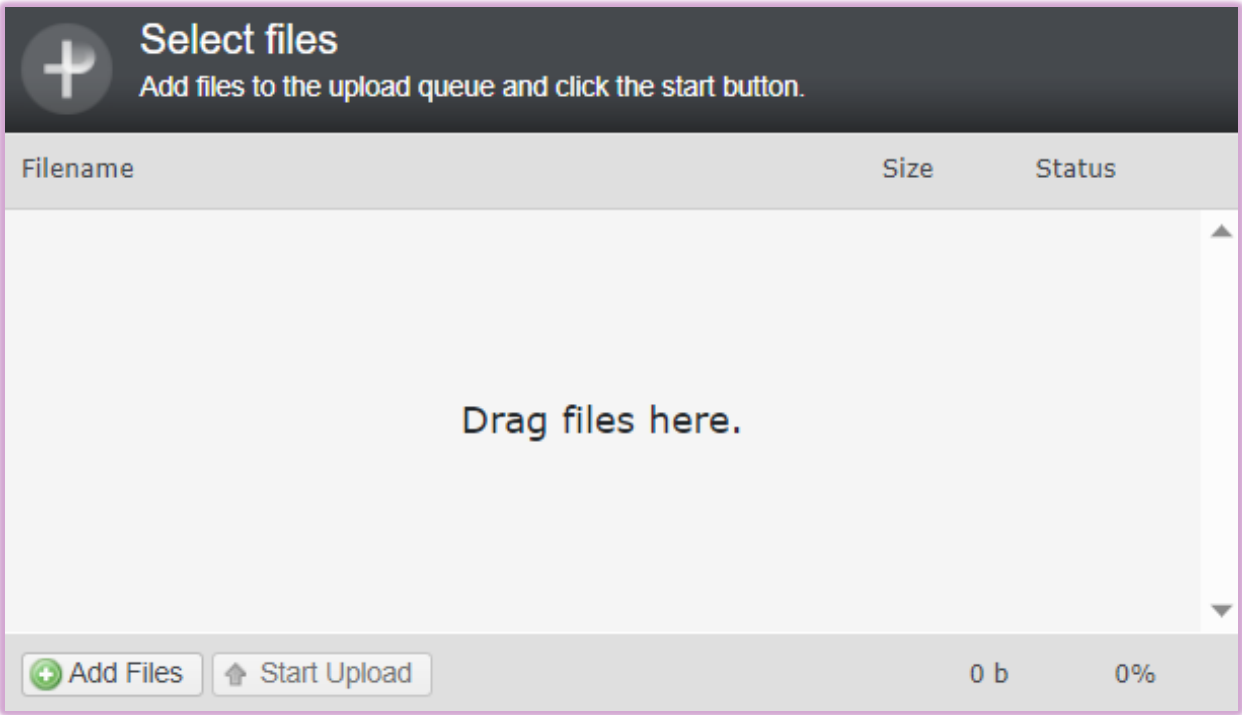
Open

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

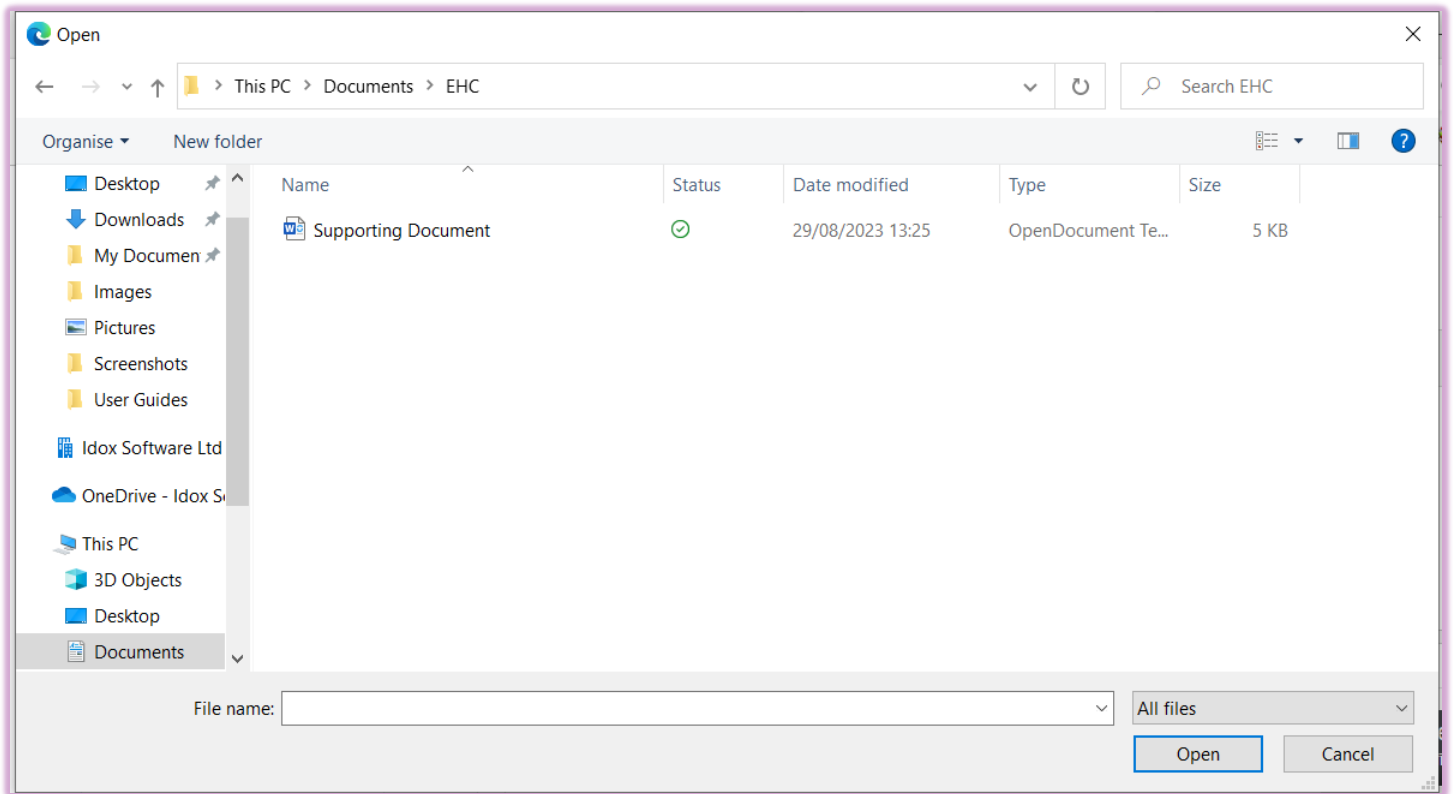


Click [here](#) for more information on using free text fields.

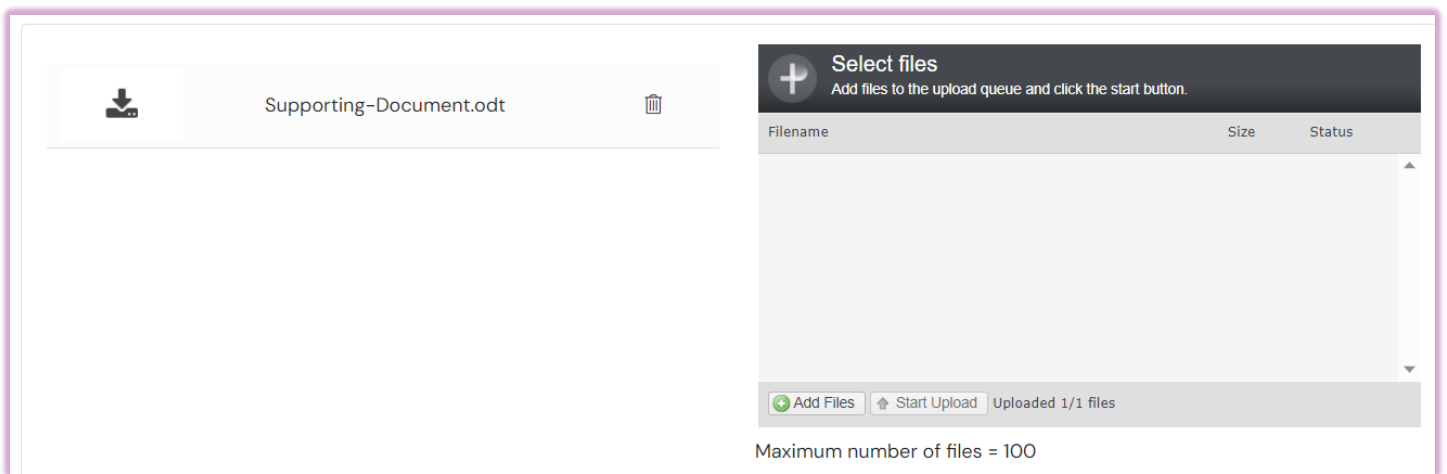
There is a section to add files. These could be files like documents, photos or short video clips. Click on the ‘Add Files’ button:



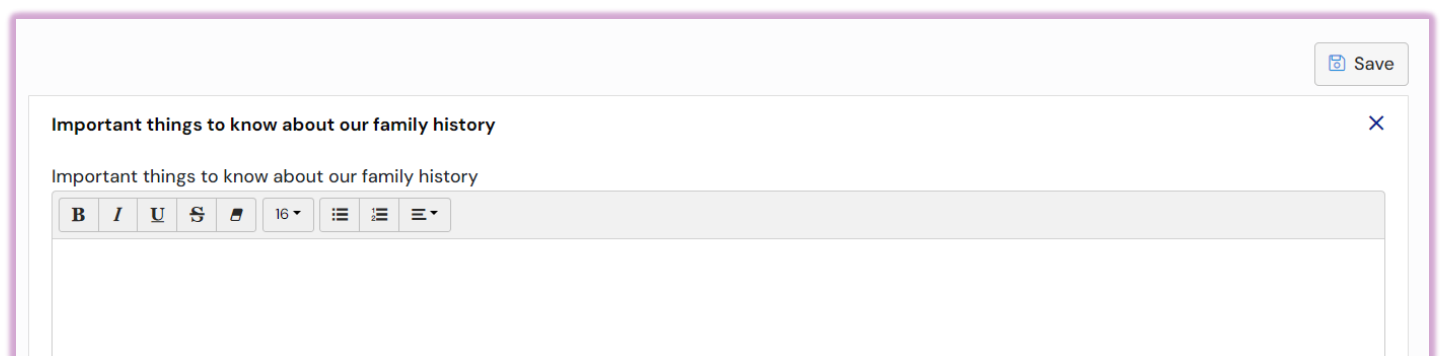
You will then need to navigate to the file wherever you have it saved on your Device:



Click '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 'Save' to save the information:



Once you have completed the information and saved it, click the X button in the top right corner and you will be taken back to the main page to choose which section you want to complete next:

Important things to know about our family history

Important things to know about our family history

B

I

U

S

16

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:

Requests for advice

Name ↑	Job title	Specialism	Requested	Request due	Request completed	Status
Health Team		Health	30/08/2023	11/10/2023		
Alana - Contributor	EP	Social Care	30/08/2023	11/10/2023		Pending
Alana - SENCO	SENCo	Education	30/08/2023	11/10/2023		Pending

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 are 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 from 'Pending' to 'Completed':

Requests for advice

Name ↑	Job title	Specialism	Requested	Request due	Request completed	Status
Health Team		Health	30/08/2023	11/10/2023		
Alana - Contributor	EP	Social Care	30/08/2023	11/10/2023	30/08/2023	Completed Read
Alana - SENCO	SENCo	Education	30/08/2023	11/10/2023		Pending

To view the response, click 'Read' and the Request for advice screen will be displayed, with the information entered by the person who the advice was requested from. You can Download a copy of the advice submission but clicking 'Download'. If you click 'Close' it will take you back to the Request for advice page.

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

CloseDownload

Are you providing a response on behalf of someone else?

☐ Yes ☒ No

Name of the person providing 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 . Alana – Contributor

Job title or role of the person providing advice:

This will give greater context to your response for the child or young person, their parent, carer or guardian and other professionals. If you have given us this context before, then we have included this for you. This is saved in your profile area should you wish to update it for future requests for advice. EP

Will you provide information & advice for this child/young person?

Yes – Child or young person is known and meets the criteria for an assessment.

Details

When did the child or young person first come into contact with your organisation?

July 2016

Details of any discussions held between the child or young person and your organisation (if relevant)

Discussion details with the parents:

-
-
-


Details of any discussions held between the parent(s) or carer(s) and your organisation (if relevant)


Discussion details with Nora:


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


What has been the effect of any support or strategies already put in place by your organisation?


Currently, the support is working well for Nora.


SEN – Communication and Interaction ☒

SEN – Cognition and Learning

SEN – Social, Emotional and Mental Health

SEN – Sensory and/or Physical Health

Health

Social Care

Click on the green arrow to view the information entered:

CloseDownload

Communication and interaction

If a decision is made to provide an education, health and care plan (EHCP), this advice may be used in section B of the EHCP.

What are the child or young person's strengths related to learning in this area?

Nora's 'Communication and interaction' Strengths are:

What are the child or young person's special educational needs related to learning in this area?

Nora's 'Communication and interaction' needs are:

What are the long-term outcomes to be achieved?

Long-term targets should include the child or young person's outcomes for the next key stage.Outcomes should be SMART (specific, measurable, achievable, realistic, time-bound) and should specify if they are education or training outcomes.

Outcome

Outcome

Communication and interaction outcome

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

Documents

Maximum number of files = 100

Professionals-contribution-notes.txt

To view these documents, click on the icon beside the document name and the document will show as a download in the top right-hand corner of the screen (the actual location of the downloaded document will be dependent on the web browser that you are using):

Downloads

Professionals-contribution-notes.txt

Open file

Click 'Open file' to view the information.

Once all 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 down arrow beside Key Dates at the bottom of the left side bar:

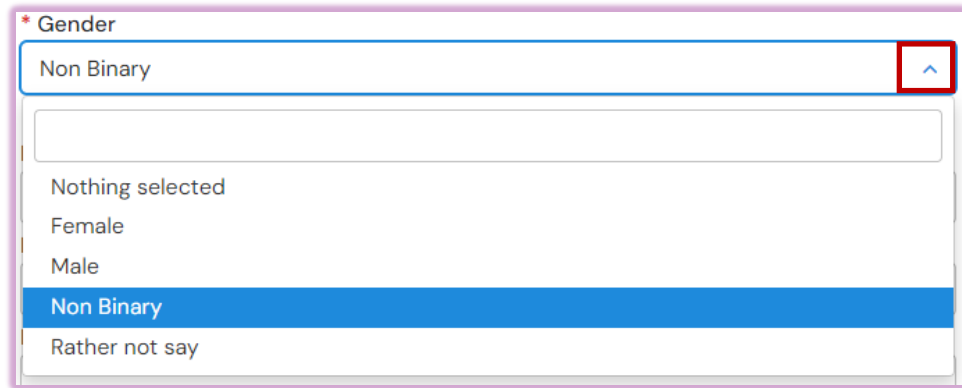
Key dates	
Case start date	17 Aug 2023
Decision to assess made on	29 Aug 2023
Decision to issue EHCP by	06 Dec 2023
Case to be completed by	03 Jan 2024

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.

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:



Free Text Field

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

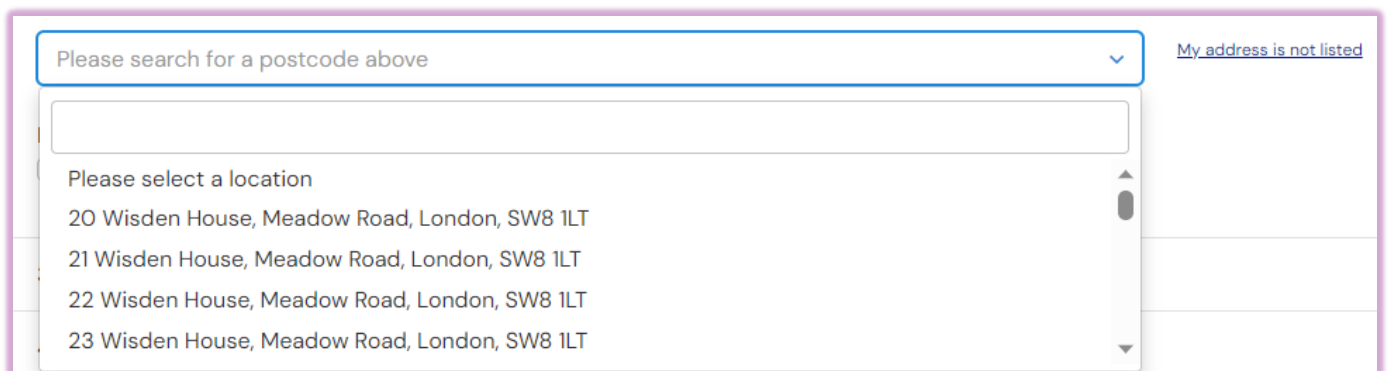
Enter the postcode of your address in the postcode search field and click on Search:



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:

Address:

20 Wisden House
Meadow Road
London
SW8 1LT

 Clear address

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:

▼

[My address is not listed](#)

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.

August 2023 ▼

↑ ↓

Mo	Tu	We	Th	Fr	Sa	Su
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3
4	5	6	7	8	9	10
Clear				Today		

Contact Us

Post:

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