

Professional Portal

User Guide for Stockton Borough Council SEN



Special Educational Needs and Disabilities 0 - 25

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Overview

The Professional Portal is a secure online gateway provided by Stockton Borough and Capita Business Services enabling professionals to self register and then provide information to the Local Authority (in relation to SEN) about the children they work with.

The main benefits of using the Portal are:

- More efficient information gathering
- More efficient information sharing
- Better engagement of child, young person & parent/carer
- Improved monitoring and sharing of the status of an application

Who will use the Professional Portal?

Any professional involved in the EHCP Assessment process, including:

- Schools / Academies
- Early Years Settings
- Post 16 establishments
- Educational Psychologists
- Medical Professionals
- Speech & Language Professionals
- Occupational Physio Professionals
- Social Care Professionals
- Health Professionals

Parents/carers and children/young people will have their own portal for submitting and sharing information, this is the Citizen Portal.

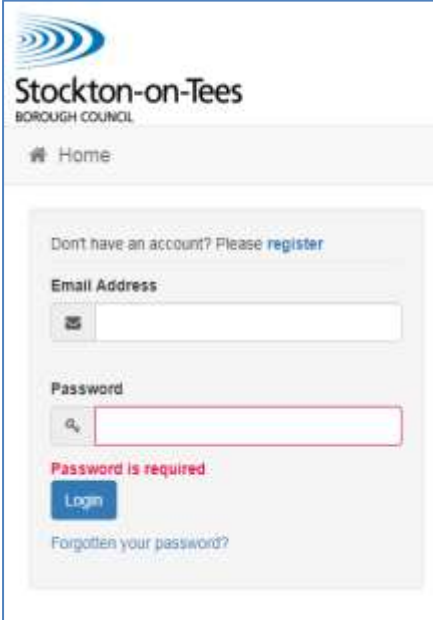
What you can do via the Portal:

- Request an assessment
- Submit requests for advice/reports
- Share your advice/reports with other professionals/parents involved with the assessment
- See other information submitted by professionals/SEN/parents involved with the assessment

Registering on the Professional Portal

To register on the Portal navigate to the following web address and save the web address to your internet favourites for easy access to the Portal:

https://emsonline.stockton.gov.uk/ProfessionalPortal_LIVE/Account/Login



The screenshot shows the login page for the Stockton-on-Tees Borough Council Professional Portal. At the top left is the council's logo and name. Below it is a 'Home' link. The main content area contains a login form with the following elements: a link for users without an account to 'register', an 'Email Address' field with an email icon, a 'Password' field with a password icon, a red error message stating 'Password is required.', a blue 'Login' button, and a link for 'Forgotten your password?'.

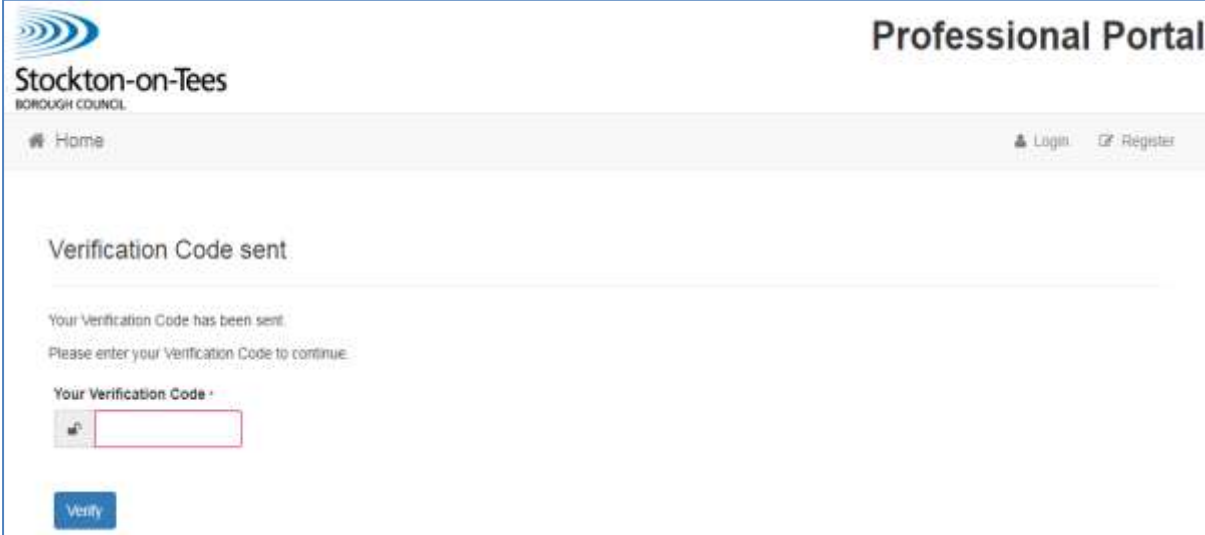
Once you are on the Portal you will have an option to Log In or Register as in the screen shot above. To register click on the Register link and follow the on screen instructions. Please use your work email address to register and fill in all the fields such as work address and phone number. You will also be required to set up Two Step Verification, this is an additional process to increase your security when logging on to the Portal. This process is mandatory if you wish to use the SEND aspect of the Portal, when enabling Two Step Verification you must select **“Email”** as your preferred method.

Please note, as part of the registration process, the Portal will send you an email to complete your registration. Please make sure to check your spam/junk folders if you cannot find the email in your main inbox.

If you need help registering please contact the SEN Team on 01642 527145.

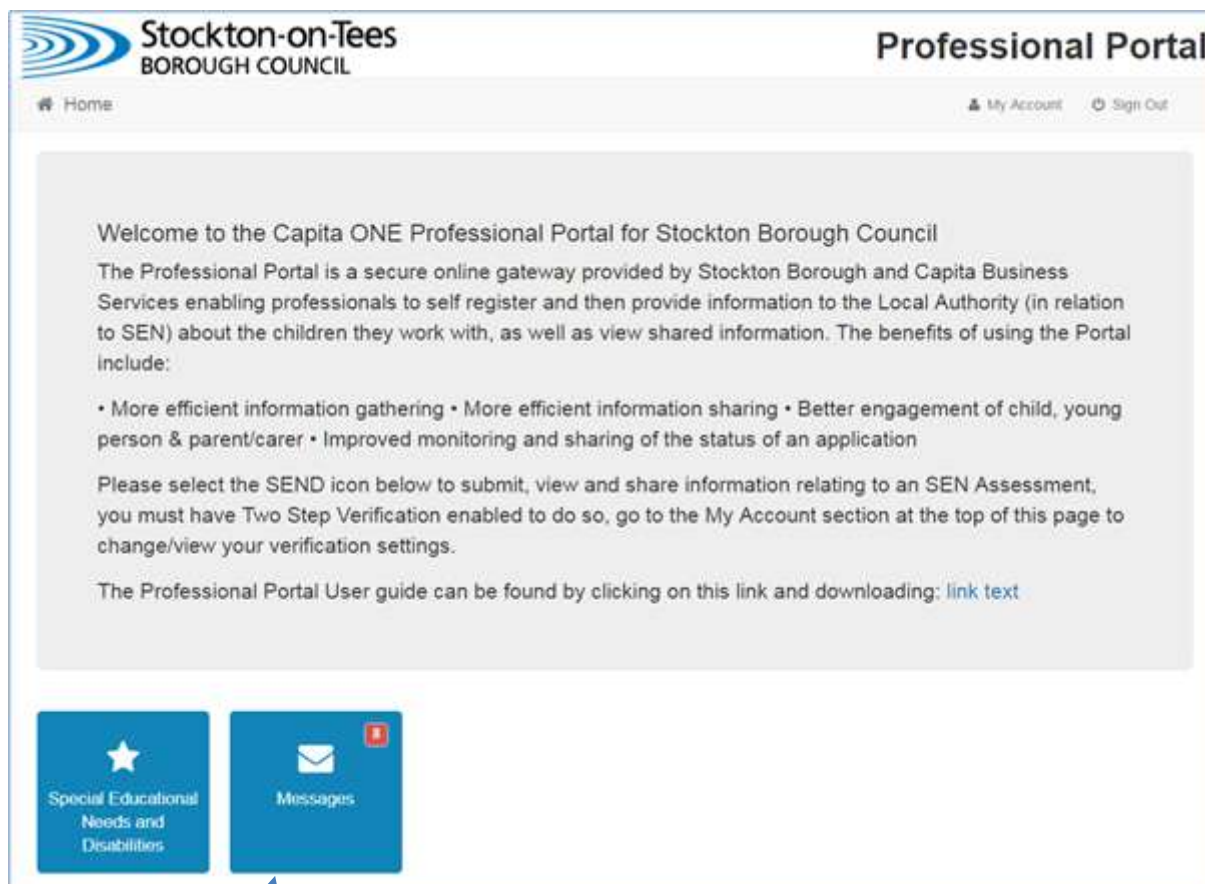
Logging into the Professional Portal

Once you have registered and enabled Two Step Verification you will now be able to use the Portal. Log in using the link on the previous page, at which point the Portal will email you a verification code, enter the code into the box as per the screen shot below and click Verify. Please make sure to check your spam/junk folders if you cannot find the email in your main inbox.



The screenshot shows the 'Professional Portal' interface for Stockton-on-Tees Borough Council. The page title is 'Professional Portal'. The header includes the council logo and name, a 'Home' link, and 'Login' and 'Register' options. The main content area displays the message 'Verification Code sent' and 'Your Verification Code has been sent. Please enter your Verification Code to continue.' Below this is a text input field labeled 'Your Verification Code' and a blue 'Verify' button.

Portal Home Page



Once you have received and inputted your verification code you will be able to see your own Professional Portal home page, here you can see messages that are sent to you that concern SEN for example the SEN Team can send a message here to let you know that you need to submit some advice regarding a child/young person.

If you click on the Special Educational Needs and Disabilities tile then you will see all the children/young people that are linked to you (see next page SEND Portal Area).

Portal Messages

The SEN Team will send you messages via the Portal, the messages will be one of the following:

- An request for you to submit information
- A reminder request if information hasn't been received
- An message alerting you that information has been shared with you

For each message you will also receive and email informing you that you have a new message to read on the Portal. It is important that all messages are read and actioned. The red numbed on the Messages tile indicates how many unread messages you have.

SEND Portal Area

In your SEND Portal area you will see the children and young people that are linked to you, meaning you can provide and receive information via the portal on these records. Children/young people can be linked to you in 2 ways:

- By adding a record yourself using the Add Person button. You will only add records yourself when you are initiating the initial assessment e.g. a school would submit a request for assessment via the portal.
- The SEN team will link a child/young person to you when requesting your input e.g. the SEN team have requested an Ed Psych report about a child from an Ed Psych professional, the child would then appear on that professional's SEND Portal area page as below:

Stockton-on-Tees
BOROUGH COUNCIL

Professional Portal

Home SEND Home My Account Sign Out

★ Special Educational Needs and Disabilities

Select Person

This area allows you to complete Special Educational Needs and Disabilities actions for children and young people you are working with. Children and young people will appear here if you have previously added them to your account or if the Local Authority has authenticated you to see Special Educational Needs and Disabilities information about them.

Person Filter All

Name	Date of Birth	Address	School
ZzAubergine, Audrey	02/08/1999		
zzRoberts, zzEbony	22/05/2006		Bader Primary
Zzthompson, Zzpoppy	08/10/2012		
Zzthompson, Zztheodore	14/06/2002		Bader Primary
ZzHolet, Veruca	01/01/2003		Bader Primary

Submitting/Viewing Information via the Professional Portal

Scenario 1: The Child Young / Young Person has been linked to you via the SEN Team and they have requested some advice as part of the EHCP Assessment

View your message that the SEN team have sent notifying you that you are required to submit some information. The screenshot below is typical of a message that you would receive via the Portal. It clearly states the name of the child/young person, the name of the form you're required to complete in this example "Early Years Setting Request for EHCP Assessment", and what date the information needs to be submitted by.



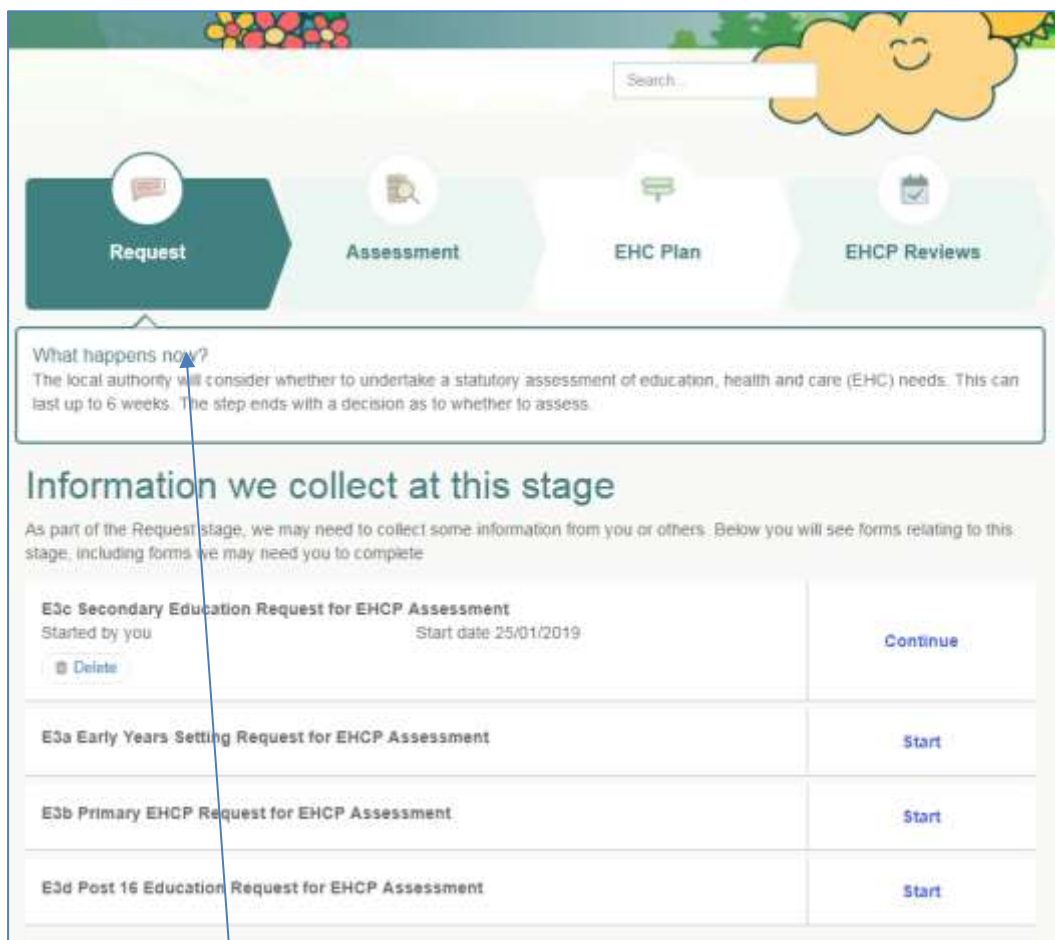
At this stage the child/ young person will already be linked to you in the Portal automatically, you will be able to then click on that record and submit and view information on that child/young person.

Clicking on the child/young person from the SEND Portal Area will bring up their personal details such as name, DOB, School and address; you can change these details but only do so if you know the existing information is incorrect.

Clicking Continue on the child details page will take you to the Forms Section where you can submit forms such as requests for assessment and view othe forms that have been submitted by other professionals and parents.

Forms Section

The Forms section is split into 4 tabs as shown in the screen shot below.



The 4 tabs are Request, Assessment, EHC Plane and EHCP Reviews, from the screen shot above the Request tab is highlighted indicating that you are that tab.

Each section contains information relevant to that stage of the assessment:

Request Tab

Here you will find:

- Early Years Setting Request for EHCP Assessment
- Primary EHCP Request for EHCP Assessment
- Secondary Education Request for EHCP Assessment
- Post 16 Education Request for EHCP Assessment

Assessment Tab

Here you will find:

- E4 Request Advice Educational Psychologist Advice
- E5a Request for Advice Designated Medical Officer v10
- E5b Request for Advice Speech and Language Therapy

- E6 Request for Advice Social Care
- E7 Request for Advice Other Professionals or Services
- EHC9c Child or Young Person Views for Education Health and Care Assessment
- Generic File Upload Manager
- Any letters sent by the SEN associated with the Assessment

EHC Plan Tab

Here you will find, if applicable:

- The Draft EHC Plan, this will be sent by the SEN Team
- The Final EHC Plan, this will be sent by the SEN Team

EHCP Reviews Tab

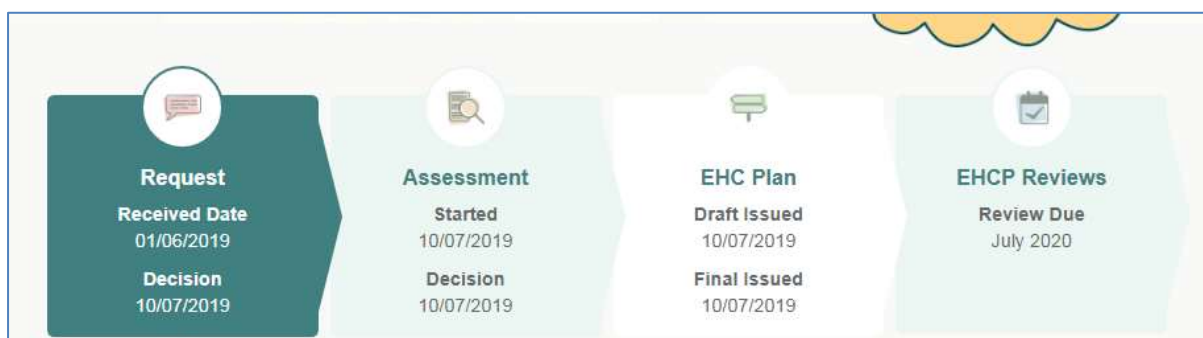
Here you will find:

- The Annual Review PRE Information and Supporting Documents form
- The Annual or Interim Review Form EHCP (including post review information) form

Each form will have a status next to it, the status could be:

- Start – start a new form
- Continue – continue a form you have already started
- View Details – view a form you have already submitted
- View Shared Form – view documents submitted by other Professionals, the SEN Team or Parents
- Delete – if you have started a form in error then you can now delete it. You can only do this on forms you have started but not submitted
- Edit – if you have submitted a form but need to change or add something then use the Edit functionality. You can only do this on forms that you have submitted

The forms section also provides useful date related information for you to keep track of the assessment:



You can see from the screen shot above when the request for assessment was received, the start and decision of the assessment, when the final plan was issued and when the annual review is due.

To start a new form search under Forms for the form you have been asked to complete, in this example Early Years Setting Request for EHCP Assessment, You can also use the Search Box to look for the form you need. **Click Start button.**

You will then be presented with the form to complete using a step by step process. The screenshot below shows the various steps needed to complete the Early Years form, there are 14 steps including the Summary which gives an overview of what you are submitting and also the confirmation and declaration information.

You can see from the screen shot below that we are on Step 3 of the form which is asking for Parent/Carer details.

The screenshot shows the user interface for the form 'Zzpoppy Zzthompson'. At the top, there is a progress bar with 14 steps. Step 1 (Work Details) and Step 2 (Additional Child Details) are completed, indicated by green checkmarks. Step 3 (Parent/Carer Details) is the current step, highlighted in blue with a dropdown arrow. Steps 4 through 14 are shown as grey buttons with right-pointing arrows. Below the progress bar, a grey box contains the text: 'Click Add More at the bottom of the page to add additional parent or carers.' The main form area contains four input fields: 'Parent/Carer Name' (a large text area), 'Relationship to Child:' (a dropdown menu with the text 'Please select the value required'), 'Parent/Carers Address' (a large text area), and 'Primary Telephone Number' (a large text area). At the bottom right of the form area is a blue 'Add More' button. At the bottom left is a 'Back' button, and at the bottom right is a 'Save & Continue' button. A blue arrow points from the text above to the Step 3 button in the progress bar.

Some sections of the form will have an “**Add More**” button which enables you to add multiple answers to a Section, e.g. Step 3 Parent/Carer details you can add one Parent or click Add More to

add additional people. Other examples where Add More will be used is if you are submitting attachments such as reports via the Portal, you will be able to Add More than one document.

Go through the form step by step completing all the required information. If you do not complete the information then the **SEN Team have the function to reject the information and re-request it.**

Once you are happy with the information you are submitting tick the two “I agree” boxes and then click “Accept”.

I confirm that I am submitting this form with the knowledge and permission of the person (or his/her parents/guardians) to whom it relates. All information I have provided as part of this form is correct to the best of my knowledge.

I agree

The information that you have provided on this form will be used in accordance with processes outlined in the current Special Educational Needs & Disabilities Code of Practice.

It is important that the child or young person and their parent or carer are able to see the information you are providing and for it to be shared with them. It will also be shared with other professionals working with the child or young person.

Before submitting this information, you must agree that the information provided can be shared with other professionals, the local authority, the child or young person and their parent or carer. If you do not agree to this, you will not be able to send it using this online form.

I agree that the information I am submitting can be shared with other professionals, the local authority, the child or young person and their parent or carer as part of processes outlined in the current Special Educational Needs & Disabilities Code of Practice.

I agree

Please note, you do not have to complete the form in one go, as you progress through the form it will save automatically and you can go back to it anytime you need to.

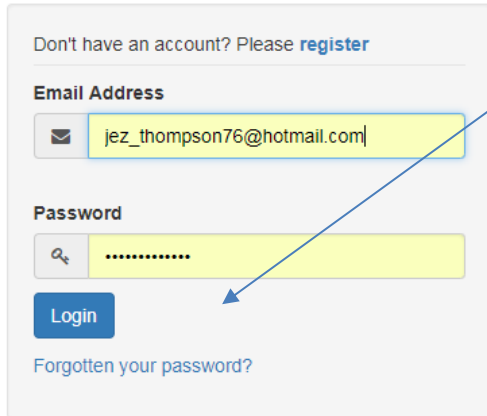
Scenario 2: You are submitting a request for an assessment for a child to the SEN Team

The only difference with Scenario 1 is in this example is that the child/young person may not be already linked to you in the portal, if this is the case then you need to Add Person from the SEND Portal Area page. Input the child’s details and complete the desired form e.g. “Primary Education Request for EHCP Assessment”.

Please note, if you are a school submitting a request for assessment then it is mandatory that you attach the Parental Consent form to the request. You will not be able to submit your request for without the Parental Consent.

Resetting / Forgotten Passwords

If you have forgotten your password please click on the “Forgotten your password” link from the portal log in screen and follow the on screen instructions by entering your email address and secret answer:



Don't have an account? Please [register](#)

Email Address

Password

[Login](#)

[Forgotten your password?](#)

A blue arrow points from the top right towards the password input field.

You will then receive the following pop up message:

Password Change Requested

Password change requested. If you have not received an email containing a link to reset your password within the next 20 minutes, please check your spam or junk folders. If you still haven't received the email then you may have entered an incorrect email address or secret answer when requesting a password reset as the portal will allow you to enter incorrect details.

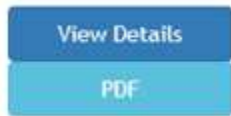
If you have tried to change a password for an unregistered email address you will not receive an email, please register in this case.

if you are unsure please contact the local authority.

IMPORTANT: You will receive a link to reset your password if you have correctly entered your email address and secret answer. If you do enter incorrect information then you will still get the pop up (above) but the link will not be sent. This is because of security reasons. If you do not receive a link, please try again using correct information, and only contact the SEN Team if you continue to have problems logging in.

PDF Forms

Certain forms on the Portal will give you the option to download as a PDF **once they have been submitted** to SEN. A form with this functionality will have a PDF button available in the Forms section:



Please note, if you see a form that has a status of Continue you will not be able to download as PDF as the form must be completed and submitted before it can be downloaded.

Key Points

- You need to register and enable Two Step Verification before you can use the Professional Portal
- Remember to check your emails for notifications that come via the Portal. Notifications will include your verification code that you will need every time you log on, and also messages from the SEN Team notifying you that you have an action to complete a form
- You can view other information submitted by Professionals or Parents such as the Parental Consent Form
- You must complete all parts of the form or your information might be rejected by the SEN Team
- You don't have to complete a form in one go, you can come back to it at a later date

If you need any assistance with using the Professional Portal then please contact the SEN Team on 01642 527145.