

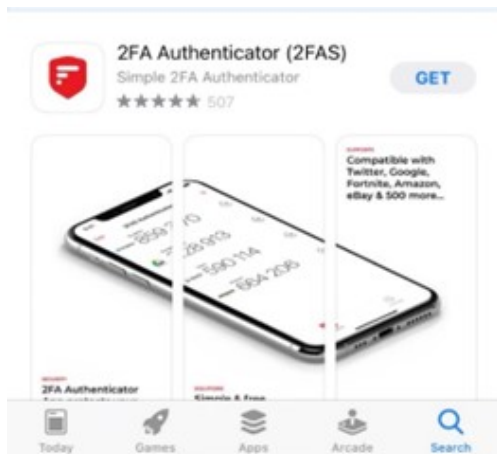
SEND professional portal guidance for educational settings and SENCOs

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Downloading Authenticator app

To access the SEND Professional portal, you are required to download a free app called **2FA Authenticator**. This app is only 2MB and does **not** retain your personal information or any other sensitive information. The app provides a second form of verification, a six-digit secure passcode, this will be required each time you sign in, do not delete the app or the code.



Open the **App Store** or the **Play Store** app
Type **2FA Auth** in the search.

Multiple options will be returned, select the **2FA Authenticator (2FAS)** app with a red badge and three white lines.

Install the app.

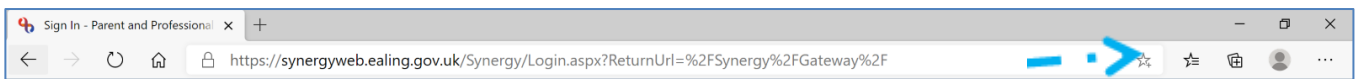
Logging in

Only **Microsoft Edge**, **Google Chrome** and **Safari** are compatible with the portal. This guide follows on from guide 1 and assumes you have already downloaded the 2FA Authenticator app.

An email titled **SEND Professional Portal** will be sent from EalingEducationICT@ealing.gov.uk containing your username and temporary password.

Copy and paste the URL: <https://synergyweb.ealing.gov.uk/Synergy/Gateway/> into the browser search bar.

You may want to add this URL to your favourites, select on the Star icon with the plus sign

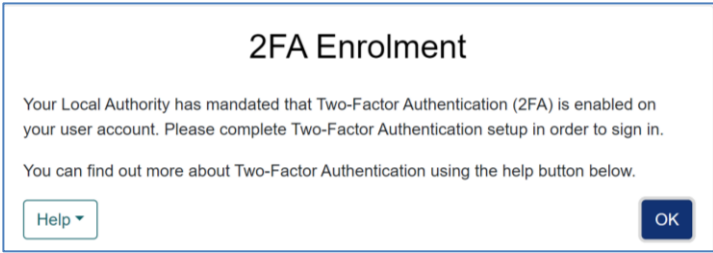


In the **Sign In** screen, enter **username**, select **Next**

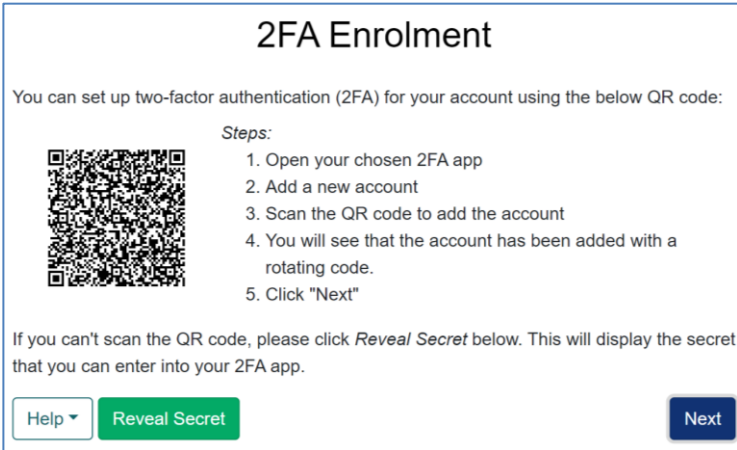
Enter your temporary password, select **Sign In**.

Add a new password in accordance to the requirements shown on the right.

Select **OK**

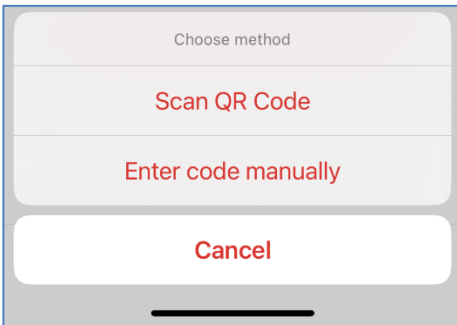
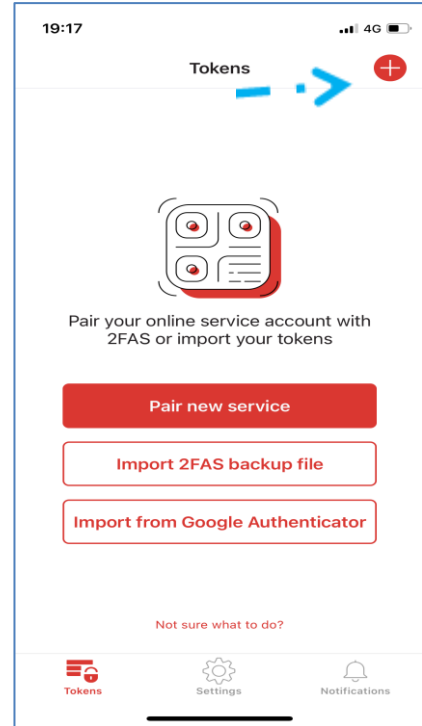


On reaching this screen, open the 2FA app to scan the QR code

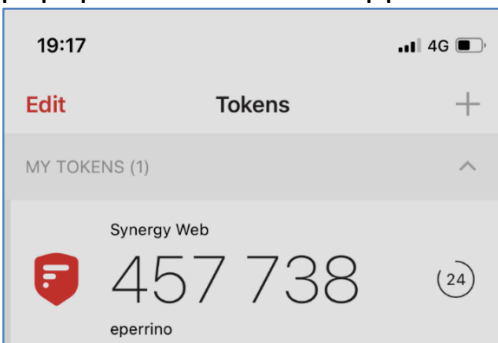


Once in the app, tap on the red circle with the plus sign.

The Choose method options pop up, select **Scan QR Code** then scan the QR Code shown in the portal.



A token appears in the app with Synergy Web above a six-digit code, the code has a 30 second count down timer next to it and under the code is your username. Close any popup windows in the app.



Add your six-digit code into the portal before the 30 second timer runs out, select **Confirm**.

2FA Enrolment

In order to complete the setup of your 2FA, you need to confirm the code displayed in the app.

The code refreshes every 30 seconds so you do not need to remember it.

Confirm your 2FA Code

BackHelp ▾Confirm

Select **Finish**.

2FA Enrolment

You have now configured your two-factor authentication and will be prompted for the code when signing in.

Finish

Searching for a child/young person's record

This is the main page, from here you can search for records.

The screenshot shows the ERSA system main page. At the top, there is a navigation bar with 'Modules', 'Profiles: _ERSA - School', 'Refresh Profile', and 'Toolkit'. On the right, it says 'Working on: LIVE' with a 'MT' logo. Below this is a search bar with a magnifying glass icon and the text 'Click to select a Child'. Underneath the search bar is a horizontal menu with several tabs: 'Checklist for Referrer - School', 'Professional Contacts', 'Child/Young Person Details', 'Parent/Carer Details', 'Achievements and Progress', and 'Special Educational Needs'. Below these tabs are several sub-tabs: 'Child/Young Person Views', 'Professional Involvement', 'Documents', 'Parent Consent', and 'Submit ERSA'. At the bottom, there is a section titled 'ERSA Introduction' with a sub-section 'Introduction'.

Select the magnifying glass icon with the **Click to select a Child** in the top left corner, enter the child/young person's details ie Forename and Surname or DOB, and select **Search**. If you are completing an App B you will have the PID number which you can use to search on.

If you cannot find the record, you can search on partial name details ie for William Test type

Forename: Will%

Surname: Tes%

This could provide multiple options; select on the record you wish to complete an ERSA or App B for.

Modules ▾ Profiles: ERSA - School Refresh Profile Toolkit

Click to select a Child

Quick Search options.

PID

DfE UPN

Forename Yes

Middle Name(s)

Parent, Who will Surname Yes

Address

Postal Code

Parent, Date Of Birth

Specify how you would like To Date Of Birth

Gender

LA Name

Current Main School

Search Clear Close

Surname	Forename	Date Of Birth
Test	Test	01/01/2005
Test	Test	24/03/2015

Search returned 2 records - a maximum of 10 are displayed

Starting an ERSA

To complete an ERSA select on the **Profiles** dropdown menu to **ERSA – School**. Adding information into an ERSA or Appendix B is a similar process, the next sections in this guide walk through how to update the ERSA. You must submit the ERSA form first and if a decision to an assessment is agreed by SENAS you will be asked to submit further advice called Appendix B.

Modules ▾ Profiles: ERSA - School Refresh Profile Toolkit

Click to select a Child

ERSA - School
Appendix B
EHC Plan

Checklist for Referrer - School Professional Contacts Child/Young Person Details Parent/Carer Details Achievements and Progress

Professional Involvement Documents Parent Consent **Contribution and Communication Method** Submit ERSA

Parent, Carer or Young person's contribution

Who will be contributing on a EHC Assessment? If it's the Parent or Carer who is contributing to the EHC Assessment, please name them

Parent, Carer or Young Person communication method

Specify how the Parent, Carer or Young person would like to contribute to a EHC Assessment If the Parent / Carer or Young person has requested to contribute via the portal, please specific the email address they will use to sign up

Adding advice into the ERSA

Within the ERSA there are multiple tabs to complete, the tab you are currently in will be highlighted in blue, example below shows the Checklist tab.

Within the tab there are multiple sections, sections begin with a blue bar and contain the word edit on the left of the bar.

Professional Involvement

Complete all the professional team involvement by selecting Yes or No. Professional name and team details can be added into the **If other, provide organisation/service/team name – specify all teams** section box.

Checklist for Referrer - School	Professional Contacts	Child/Young Person Details	Parent/Carer Details	Achievements and Progress	Special Educational Needs
Child/Young Person Views	Professional Involvement	Documents	Parent Consent	Contribution and Communication Method	Submit ERSA

Specify professionals involved that you are aware edit

Child Development Team <input checked="" type="radio"/> Yes <input type="radio"/> No Speech and Language Therapy <input checked="" type="radio"/> Yes <input type="radio"/> No Occupational Therapy <input checked="" type="radio"/> Yes <input type="radio"/> No Children and Adolescent Mental Health Service (CAMHS) <input type="radio"/> Yes <input checked="" type="radio"/> No Ophthalmology <input type="radio"/> Yes <input checked="" type="radio"/> No Dietician <input type="radio"/> Yes <input checked="" type="radio"/> No Adult Mental Health Services <input type="radio"/> Yes <input checked="" type="radio"/> No Other health professionals <input type="radio"/> Yes <input checked="" type="radio"/> No Education Psychology <input checked="" type="radio"/> Yes <input type="radio"/> No Hospital <input checked="" type="radio"/> Yes <input type="radio"/> No	LAC Health Professional <input checked="" type="radio"/> Yes <input type="radio"/> No Physiotherapy <input checked="" type="radio"/> Yes <input type="radio"/> No Children's Community Nursing Team <input checked="" type="radio"/> Yes <input type="radio"/> No Audiology <input type="radio"/> Yes <input checked="" type="radio"/> No Ealing Hearing and Visual Sensory Impairment Service <input type="radio"/> Yes <input checked="" type="radio"/> No Continence Nurse <input type="radio"/> Yes <input checked="" type="radio"/> No Community Team for People with Learning Difficulties <input type="radio"/> Yes <input checked="" type="radio"/> No Social Care <input type="radio"/> Yes <input checked="" type="radio"/> No Ealing Primary Centre <input type="radio"/> Yes <input checked="" type="radio"/> No
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If other, provide organisation/service/team name – specify all teams

SLT - SLT Name and address - SLT telephone number and email

EP - EP Name and address - EP telephone number and email

Private Therapist - Private Therapist Name and address - Private Therapist telephone number and email

Parent and young person views

The parent/ carer details now contain the new co-produced parent views. The Child/ young person views tab also includes a co-produced child view. These set of questions are to aid parents, if families wish to submit their own views as part of the ERSA.

Checklist for Referrer - School	Professional Contacts	Child/Young Person Details	Parent/Carer Details	Achievements and Progress	Special Educational Needs
Child/Young Person Views	Professional Involvement	Documents	Parent Consent	Submit ERSA	

Separate documents can be attached in the documents section.

Checklist for Referrer - School	Professional Contacts	Child/Young Person Details	Parent/Carer Details	Achievements and Progress	Special Educational Needs
Child/Young Person Views	Professional Involvement	Documents	Parent Consent	Submit ERSA	

To complete an ERSA, select each box above and complete the sections inside. Edit and update each section as required.

Uploading documents

Only upload PDFs. PDF file size must be less than 3mb

To attach documents as part of the ERSA or App B select the **Documents** section.

Checklist for Referrer - School	Professional Contacts	Child/Young Person Details	Parent/Carer Details	Achievements and Progress	Special Educational Needs
Child/Young Person Views	Professional Involvement	Documents	Parent Consent	Submit ERSA	

Document Checklist edit

Upload Provision Map <input type="radio"/> Yes <input type="radio"/> No	Upload attendance record from SIMS <input type="radio"/> Yes <input type="radio"/> No
---	---

Select **new** to add a document.

The screenshot shows a 'Document Upload' form with the following fields: Title, Date Uploaded, Document Category, Reason for Including the Information, Document Name, Document Sub Category, and an 'Upload New File' button. There are also 'insert' and 'cancel' links in the top right corner.

Fill in the relevant fields and in **Category** select **SEND Portal** and **Sub Category** select **ERSA documents**. Select **upload new file**.

The screenshot shows a file selection dialog titled 'Select File to upload:'. It includes a text input field, a 'Browse...' button, and 'Upload File' and 'Cancel' buttons at the bottom.

Select **Browse** and choose which documents you want to add from your computer, select **Open** then **upload file**. Once this is done save your progress by selecting **insert**.

Parental consent

Before submitting an ERSA, you will need to obtain parental consent. Please fill in all mandatory fields with the parent present indicating that they agree with the information being submitted.

The screenshot shows a navigation menu with tabs: Checklist for Referrer - School, Professional Contacts, Child/Young Person Details, Parent/Carer Details, Achievements and Progress, Special Educational Needs, Child/Young Person Views, Professional Involvement, Documents, Parent Consent, and Submit ERSA. The 'Parent Consent' tab is selected. Below the menu is a form titled 'Parent/Carer/Young Person consents to:' with 'update' and 'cancel' buttons. The form contains four consent statements, each with a text input field and a document icon:

- Parent agrees to this request for Ealing Council to carry out an Education, Health and Care (EHC) Needs Assessment.
- Parent understands that independent, impartial agencies may contact them by telephone if the EHC Needs Assessment is agreed.
- Parent understands that if an Education, Health and Care Needs Assessment is agreed, information will be shared with professionals involved with my child/me to support the assessment and planning process.
- Parent has discussed with the Local Authority the information & they are happy for them to share with other agencies and understand that it will be shared using locally agreed protocols for information collection, management and confidentiality.

Obtaining parent signature

Although parents can add their name as a digital signature, we recommended that you either print this page and ask parent to sign the printout or upload the consent form you currently use as part of the ERSA.

The screenshot shows three sections of the form:

- Optional:** A section with a heading and an 'edit' link. It contains a checkbox for 'Parent agrees for the Local Authority to share their contact details with Ealing's independent impartial family services' with radio buttons for 'Yes' and 'No'.
- Note:** A section with a heading and an 'edit' link. It contains a checkbox for 'Please note that confidentiality will be broken when there are safeguarding concerns'.
- Parental Consent:** A section with a heading and an 'edit' link. It contains two text input fields: 'Name: (By typing in your name, we accept this as your lawful signature:)' and 'Date of Parent / Carer Signature'.

Parent portal communication preference

You can enter parents preferred communication method to contribute to EHC.assessment.

nts	Parent Consent	Parent / YP Portal & Communication	Submit ERSA
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This will include the option to use the email, letter, and Parent portal. See guidance on signposting to the Parent and young person’s portal.

Parent / Carer or Young person's contribution		edit
Who will be contributing on a EHC Assessment?	Parent	If it's the Parent or Carer who is contributing to the EHC Assessment, please name them
Parent / Carer / Young Person Communication Method		update cancel
Specify how the Parent, Carer or Young person would like to contribute to a EHC Assessment	Parent Portal	Please supply the Parent / Carer or Young Person Email address used for the Parent Portal

Preview the ERSA

<h3>Education Request for Statutory Assessment (ERSA)</h3> <p>Achievements & Progress Section not Completed Document History Section not Completed Child/Young Person Views Section not Completed Special Educational Needs Section not Completed Parent/YP Checkbox Section not Completed Professional Contacts Section not Completed Child/YP Details Section not Completed Parent Consent Section not Completed</p> <p>Referrer Details</p> <p>This request was completed with the consent of the family and/or young person:</p> <table border="1"> <tr> <td>Referrer's Name</td> <td></td> </tr> <tr> <td>Job Title</td> <td>SENCO</td> </tr> </table>	Referrer's Name		Job Title	SENCO
Referrer's Name				
Job Title	SENCO			

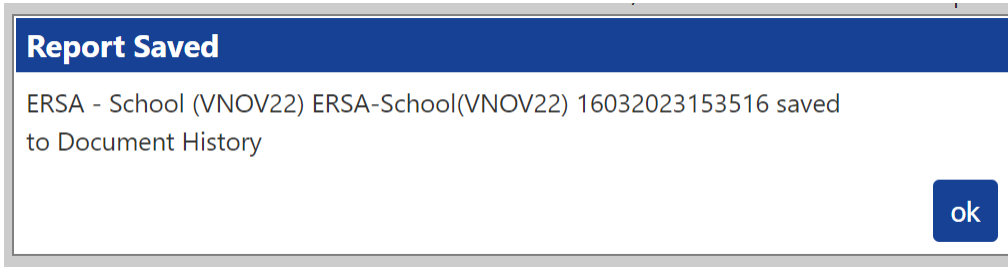
To preview the ERSA before submitting select **run report** and from the dropdown use **ERSA VNOV22 (Preview)**. You will be asked to open the PDF.

If any sections have not been filled in you will see text in red stating which section needs updating.

Submit the ERSA to SENAS

Before submitting tick that you have covered every section of the ERSA. Go to the **Submit ERSA** tab, **run report**, select **ERSA – NOV 22** from the dropdown then select **run report**.

Run Report	
*Report	ERSA - (Preview) School
*Format	ERSA - (Preview) School Parent/Carer/Young Person Consent Form (Please Pr ERSA Cancelled ERSA - School (VNOV22) ERSA - School (VNOV22) (Preview)
* = mandatory field	
<input type="button" value="run report"/> <input type="button" value="cancel"/>	



Report Saved pop-up window confirms the report has saved into **Documents** tab.

Checking the ERSA has been uploaded

Select on the **Documents** tab. Scroll to the **Documents list** section

If you can see the **ERSA – School (VNOV22) ERSA** line with the submitters name on the right, the ERSA has been uploaded. You should receive confirmation of receipt within 3 days and if you do not then email ERSA@ealing.gov.uk

Checklist for Referrer - School	Professional Contacts	Child/Young Person Details	Parent/Carer Details	Achievements and Progress	Special Educational Needs	Child/Young Person Views
Professional Involvement	Documents	Parent Consent	Contribution and Communication Method	Submit ERSA		

Pupil Alert flag set

Document Checklist edit

Upload costed provision map for the last year Yes No

Upload attendance record from SIMS Yes No

Upload baseline measures for the last year Yes No

Uploaded any other relevant information Yes No

Document Upload edit new

Title	ERSA - School (VNOV22) ERSA-School(VNOV22) 160320231!	Document Name	ERSA-School(VNOV22)_16032023153516.Pdf
Date Uploaded	16/03/2023		Download File
Document Category	SEND (Portal)	Document Sub Category	Ealing Request for Statutory Assessment (ERSA)
Reason for Including the Information			

Starting an Appendix B (SENCO Advice)

App B and professional reports can be added by selecting the **profile** tab and the relevant report from the drop-down menu.

Modules ▾ Profiles: Appendix B ▾ Refresh Profile Toolkit Working on: LIVE MT

Search: Surname: Test Forename: Test Middle Name(s): Date Of Birth: 01/09/2002 Gender: Male DFE UPN: NC Year: NC Year 13 System Ref: 766817

Appendix B - Education	Documents	Appendix A	Appendix C - Joint Health Form	Appendix C - CAMHS	Appendix C - CTPLD	Appendix C - Nursing
Appendix C - GP	Appendix D - EP	Appendix E - Social Care	Appendix F - HI	Appendix F - VI	Appendix C / F - Other Professionals	

Appendix B

- ERSA - School
- Appendix A
- Appendix B**
- Appendix C - CAMHS
- Appendix C - CTPLD
- Appendix C - GP
- Appendix C - Joint Health Form
- Appendix C - Nursing
- Appendix C / F - Other Professionals
- Appendix D - EP

Adding an outcome

The outcome section is available at the end of every professional report. To read all outcomes added by various professionals double select on the outcome title from the left column. SENCO's may wish to add an outcome, this is not compulsory.

Section E-H2 Outcomes & Provision Required to Meet Outcomes List		
Outcome	How will progress be monitored?	Outcome Type and Team
for test to be able to regulate his emotions and reduce his violent out...	Termly	Social Care - H1
Test will accurately verbally describe the sequence of events in a non-f...	Termly- up to 45 minutes per term	SLT - Comms
Test will identify and communicate his feelings to familiar adults in sch...	3x a week for 20-30 minutes	SLT - Comms
Test will identify and practice emotional regulation strategies he can u...	10 direct hours per year	SLT - Comms
test		
iuusegfg	termly/ annual review	EP - C&L
to be able to run	termly	SLT - Comms
test will identify and communicate his feelings to familiar adults in sch...	weekly	SLT - Comms

Section E-H2 Outcomes & Provision Required to Meet Outcomes Detail	
Outcome	<p>test will identify and communicate his feelings to familiar adults in school and at home, with visual supports.</p> <p>test will identify and practice emotional regulation strategies he can use in school and at home, to manage his emotions more independently.</p> <p>test will accurately verbally describe the sequence of events in a non-fiction text using his own words in full sentences.</p> <p>test will talk about a communication breakdown using a comic strip conversation, with adult support, and identify appropriate solutions to the problem 75% of the time.</p> <p>test will demonstrate appropriate turn-taking, topic maintenance and conversational skills e.g. looking at the conversational partner, whole-body listening, asking follow-up questions etc. in a structured group setting, led by an adult with visual prompts.</p>
Provision (Details of provision and how often)	<p>3x a week for 20-30 minutes (LSA).</p> <p>10 direct hours per year</p> <p>Termly- up to 45 minutes per term</p> <p>Once a year- 1.5 hours</p> <p>Primary School Day- 6 hours</p> <p>Supporting Children with Social Communication Difficulties – 3 hours</p> <p>Reading for Meaning training - 3 hours</p> <p>Twice a year (3 hours)</p>

By default, the most recent outcome will display first. To add an outcome, select **new**.

Section E-H2 Outcomes & Provision Required to Meet Outcomes Detail	
Outcome	<input type="text"/>
Provision (Details of provision and how often)	<input type="text"/>
How will progress be monitored?	<input type="text"/> Responsible Agency <input type="text"/>
Who will provide support	<input type="text"/>
Outcome Type and Team	<input type="text"/>

* = mandatory field

Complete each section and select **insert** to save your outcome. When selecting the outcome type/ team a drop-down menu will appear with the relevant agencies. This will indicate who wrote the outcome and who is responsible for it.

For example, a cognition and learning outcome from an EP will look like this.

Outcome Type and Team: School - C&L

* = mandatory field

Appendix B - Report Author

Report Author: [text box]

School Name: [text box]

Appendix B - Submit Report

- Physio - PSI
- Physio - SEMH
- School - C&L
- School - Comms
- School - Health
- School - PSI
- School - SEMH
- School - Social Care
- SLT - C&L
- SLT - Comms
- SLT - Health
- SLT - PSI
- SLT - SEMH
- Social Care - H1
- Social Care - H2

Submitting Appendix B into SENAS

To submit an App B, complete the **Report Author** section, scroll to the bottom of the page and select **run report**.

Appendix B - Report Author [edit]

Report Author: [text box] Job Title: [text box]

School Name: [text box] Date Advice Written: [text box]

Appendix B - Submit Report [run report] [edit]

A pop up appears select Appendix B - School and select on **run report** button

Run Report

* Report: Appendix B - School

* Format: Portable Document Format (Pdf)

* = mandatory field

Open Report after creation

[run report] [cancel]

A pop up appears letting you know the document has been saved in **Document History** which means the App B has been submitted into SENAS.

Report Saved

Appendix B - School AppendixB-School 23022023165754 saved to Document History

[ok]

You can check the document has been submitted by selecting on the **Documents** tab and checking in the **Documents list** section.

Appendix B - School Append...	AppendixB-School_2004202...	20/04/2023	SEND (Portal)	Appendix B - Headteacher	20/04/2023 14:49:21
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FAQs and further support

For further assistance select on **SEND professional portal frequently asked questions (FAQs)** however if a query is still unresolved, contact Ealing Education ICT at EalingEducationICT@ealing.gov.uk