

# SEND professional portal guidance for educational settings and SENCOs

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If you need help, please contact Ealing Education ICT by email

[EalingEducationICT@ealing.gov.uk](mailto:EalingEducationICT@ealing.gov.uk)

To access the SEND Professional portal, you are required to download a free app called **2FA Authenticator**.

### About **2FA Authenticator** app

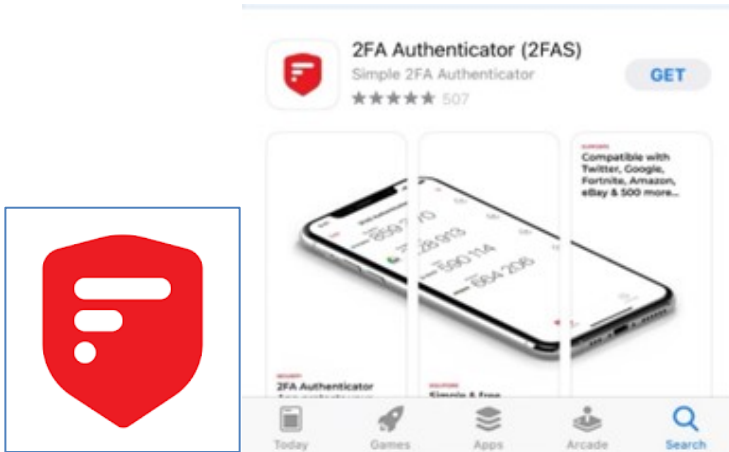
This app is only 2MB and does **not** retain your personal information or any other sensitive information.

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.

## Download 2FA Authenticator app

To download 2FA Authenticator:

- Open the **App Store** or the **Play Store** app
- Type **2FA Auth** in the search.
- Select the **2FA Authenticator (2FAS)** app with a red badge and three white lines.



- Install the app.

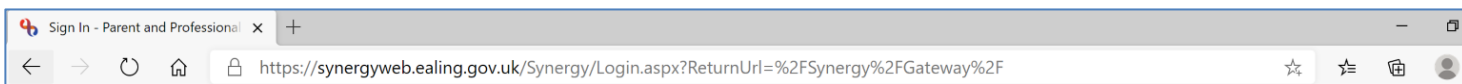
## Log in details

Only **Microsoft Edge**, **Google Chrome** and **Safari** are compatible with the portal.

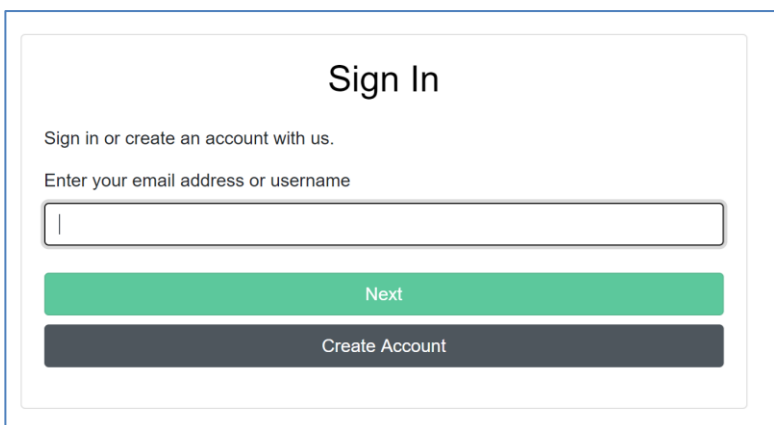
An email with the subject **SEND Professional Portal** will be sent from [EalingEducationICT@ealing.gov.uk](mailto:EalingEducationICT@ealing.gov.uk) containing your username and temporary password.

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, click on the Star icon with the plus sign



On the **Sign In** screen, enter **username**, click **Next**



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

### Sign in

Enter your password

Enter a new password using the requirements shown

### Reset password

New Password \*

Password fails requirements

Confirm Password \*

Please confirm your password

**Requirements:**

- Alpha character ✓
- Uppercase character ✓
- Numeric character ✗
- Special character ✗
- 10 characters ✗
- Not username ✓
- Not last 10 passwords ⚠

Select **OK**

### 2FA Enrolment


Your Local Authority has mandated that Two-Factor Authentication (2FA) is enabled on your user account. Please complete Two-Factor Authentication setup in order to sign in.

You can find out more about Two-Factor Authentication using the help button below.

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

### 2FA Enrolment

You can set up two-factor authentication (2FA) for your account using the below QR code:

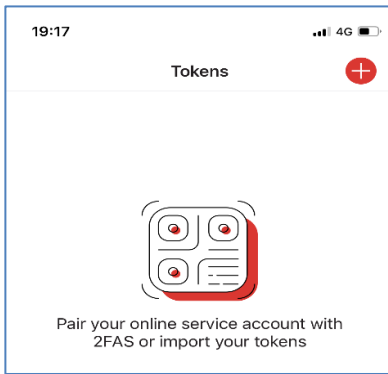


*Steps:*

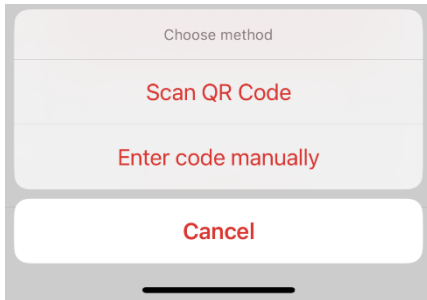
1. Open your chosen 2FA app
2. Add a new account
3. Scan the QR code to add the account
4. You will see that the account has been added with a rotating code.
5. Click "Next"

If you can't scan the QR code, please click *Reveal Secret* below. This will display the secret that you can enter into your 2FA app.

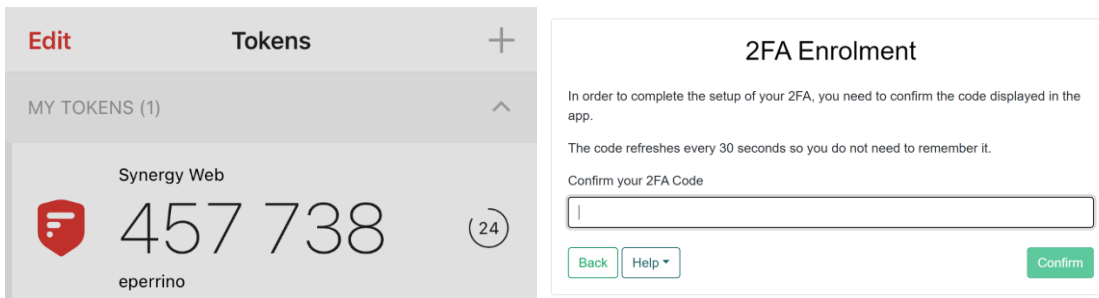
Once in the app, select the red circle with the plus sign located on the top right hand side.



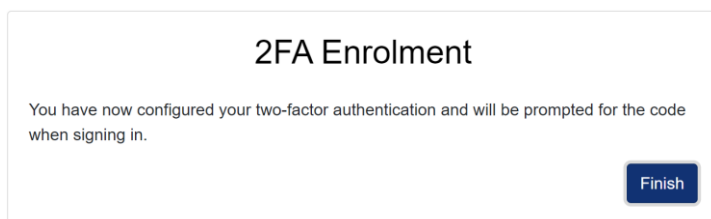
## Select **Scan QR Code**.



Enter the 6 digit code into the portal immediately and select **Confirm**. You must enter the code within 30 seconds. Your **username** is visible below the 6 digit code.



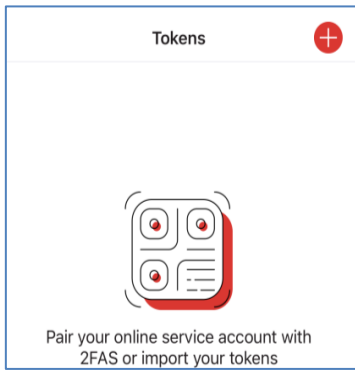
## Select **Finish**.



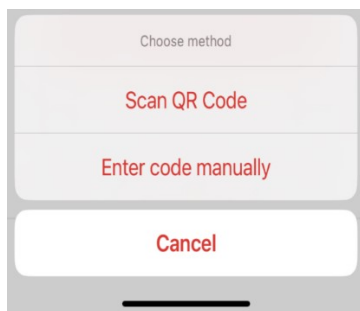
If you need help please contact Ealing Education ICT via email [EalingEducationICT@ealing.gov.uk](mailto:EalingEducationICT@ealing.gov.uk)

**I have downloaded the 2FAS authentication app it says service list is empty.**

Go into the app, select the + sign and select scan QR code.



Log into the SEND Professional Portal using your **username** and temporary password and select **Scan QR code** to gain access.



### I have a new phone, how do I set up the security authentication?

Your account will need to be reset. Email [EalingEducationICT@ealing.gov.uk](mailto:EalingEducationICT@ealing.gov.uk) to advise them you have a new phone. They will reset your account to enable you to scan the QR code.

### I forgot my password; how can it be reset?

You can get a password on the portal if you have logged in within the last 55 days. To do this, sign in select **Next** then select **forgot password**. You should receive a token to your email.

If you have not logged in to your account yet, we would need to reset this for you.

Enter your password

Change User

Forgot Password

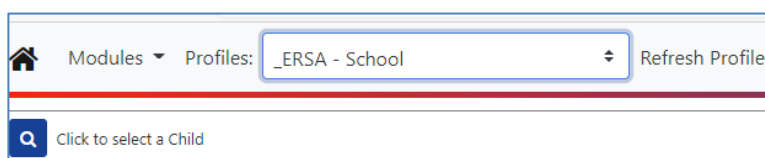
Sign In

Please email [EalingEducationICT@ealing.gov.uk](mailto:EalingEducationICT@ealing.gov.uk) to advise us of this.

Do log in to the SEND Professional Portal regularly.

### Search for a child/young person's record

From the main page 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 using partial name details ie for William Test type Forename: Will% and Surname: Tes%

This may provide multiple options, select the record you wish to complete an ERSA or Appendix B for.

ERSA - School

Click to select a Child

Quick Search options.

PID

DFE UPN

Forename

Middle Name(s)

Surname

Address

Postal Code

Date Of Birth

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

## Complete an ERSA

To complete an ERSA select 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.

https://synergyweb.ealing.gov.uk/Synergy/Gateway/

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	<b>Contribution and Communication Method</b>	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

## Add advice in the ERSA

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

Within the tab there are multiple sections. To edit details select edit located on the left hand side of the blue bar.

The screenshot shows the ERSA interface with the 'Checklist for Referrer - School' tab selected. The top navigation bar includes 'Modules', 'Profiles: ERSA - School', 'Refresh Profile', and 'Toolkit'. The user's profile information is displayed: Surname: Test, Forename: Test, Middle Name(s):, Date Of Birth: 24/03/2015, Gender: Male, DFE UPN:, NC Year: NC Year 3, and PID: 807544. The main content area shows a grid of tabs: Checklist for Referrer - School (selected), Professional Contacts, Child/Young Person Details, Parent/Carer Details, Achievements and Progress, and Special Educational Needs. Below this grid are additional tabs: Child/Young Person Views, Professional Involvement, Documents, Parent Consent, Contribution and Communication Method, and Submit ERSA. A yellow banner indicates 'Pupil Alert flag set'. The 'ERSA Introduction' section is visible with an 'edit' button on the right.

Select **edit** to enter information in each section

The screenshot shows the ERSA interface with the 'ERSA Introduction' section in edit mode. The top navigation bar and user profile information are the same as in the previous screenshot. The 'Checklist for Referrer - School' tab is still selected. The 'ERSA Introduction' section is highlighted in blue and has an 'edit' button on the right. Below the section header is a rich text editor with a toolbar containing icons for undo, redo, bold, italic, underline, text color, font size (12), font face (Segoe UI), strikethrough, link, unlink, bulleted list, numbered list, indent, and outdent. The text area contains the instruction: 'Add your introduction here which will also be shown in the App B so that you do not need to retype.' Below the text area is a legend: '\* = mandatory field'. The 'Referrer Details' section is visible below, with an 'update' and 'cancel' button on the right.

Once you select **edit** the section will change colour indicating which areas can be amended. Once you complete the section select **update** to save your work.

## Professional contacts – GP contact and Social Care Involvement

GP and social care details are mandatory. The ERSA will not be progressed without these.

If the child/young person is **not known** to social care, select **No**. If they are known, select **Yes** and complete each section.

Checklist for Referrer - School ▼	<b>Professional Contacts</b> ▼	Child/Young Person Details ▼	Parent/Carer Details ▼	Achievements and Progress ▼	Special Educational Needs ▼
Child/Young Person Views ▼	Professional Involvement ▼	Documents ▼	Parent Consent ▼	Submit ERSA ▼	
Pupil Alert flag set					
<b>GP Details</b> <span style="float: right;">edit</span>					
GP Forename	GP Forename Test	GP Surname	GP Surname Test		
GP Practice Name	GP Practice Test	GP Full Address	GP Full Address Test		
GP Postcode	GP Postcode Test	GP Telephone	GP Telephone Test		
<b>Social Care Details</b> <span style="float: right;">update cancel</span>					
Is the Child/Young Person known to Social Services? <input checked="" type="radio"/> Yes <input type="radio"/> No <small>Clear to the Child/Young Person known to Social Services? Selection</small>		How is the Child known to Social Services? (Please select an applicable answer if the previous question has an answer of Yes)		<input type="text"/> Child/Young person a 'child in need' (CIN) Child/Young Person on the Child Protection Register (CP) Looked After Child (LAC)	
Social Worker Title	Mandatory field	Social Worker Forename	Mandatory field		
Social Worker Surname	Mandatory field	Organisation/Authority Name	Mandatory field		



## 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	<b>Professional Involvement</b>	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	LAC Health Professional <input checked="" type="radio"/> Yes <input type="radio"/> No
Speech and Language Therapy <input checked="" type="radio"/> Yes <input type="radio"/> No	Physiotherapy <input checked="" type="radio"/> Yes <input type="radio"/> No
Occupational Therapy <input checked="" type="radio"/> Yes <input type="radio"/> No	Children's Community Nursing Team <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	Audiology <input type="radio"/> Yes <input checked="" type="radio"/> No
Ophthalmology <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
Dietician <input type="radio"/> Yes <input checked="" type="radio"/> No	Continence Nurse <input type="radio"/> Yes <input checked="" type="radio"/> No
Adult Mental Health Services <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
Other health professionals <input type="radio"/> Yes <input checked="" type="radio"/> No	Social Care <input type="radio"/> Yes <input checked="" type="radio"/> No
Education Psychology <input checked="" type="radio"/> Yes <input type="radio"/> No	Ealing Primary Centre <input type="radio"/> Yes <input checked="" type="radio"/> No
Hospital <input checked="" type="radio"/> Yes <input type="radio"/> No	

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

**If hospital is selected, complete the following:** edit

What is the name of the hospital?  What is the name of the team?

**Section Checklist** edit

Professional Involvement - Section Complete  Yes  No

## 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 questions can 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	<b>Parent/Carer Details</b>	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
<b>Child/Young Person Views</b>	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.

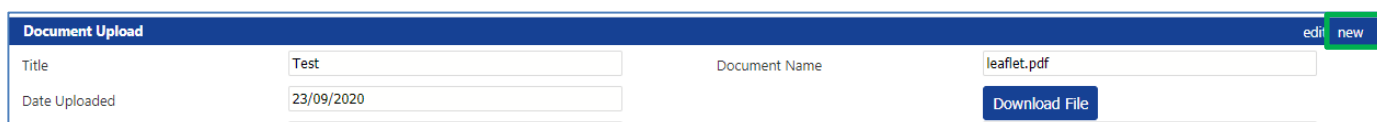
## Upload PDF documents

You can only upload PDFs, where the file size is less than 3mb

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	<b>Documents</b>	Parent Consent	Submit ERSA	

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

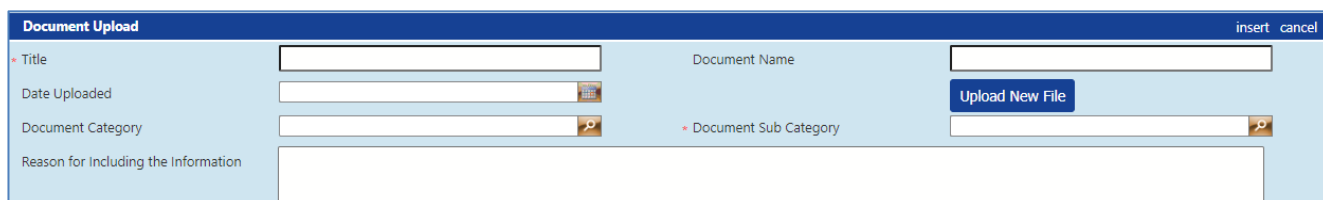
To add a document, select **new**.



The screenshot shows a 'Document Upload' form with the following fields: Title (containing 'Test'), Date Uploaded (containing '23/09/2020'), and Document Name (containing 'leaflet.pdf'). There is a 'Download File' button and a 'new' button in the top right corner.

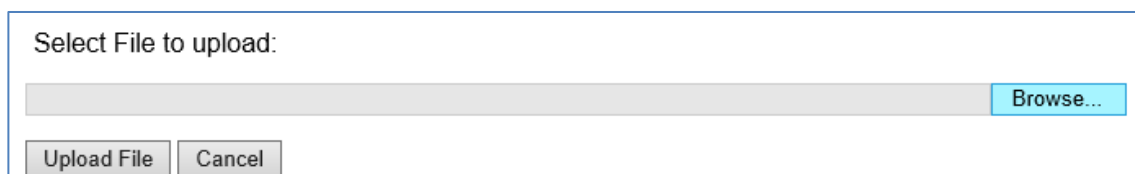
Enter the document title. In the **Documents category** box select **SEND Portal**

In the **Documents Sub Category** box select ERSA documents.



The screenshot shows the 'Document Upload' form with dropdown menus for 'Document Category' and 'Document Sub Category'. There is an 'Upload New File' button and 'insert' and 'cancel' buttons in the top right corner.

Select **upload new file**.



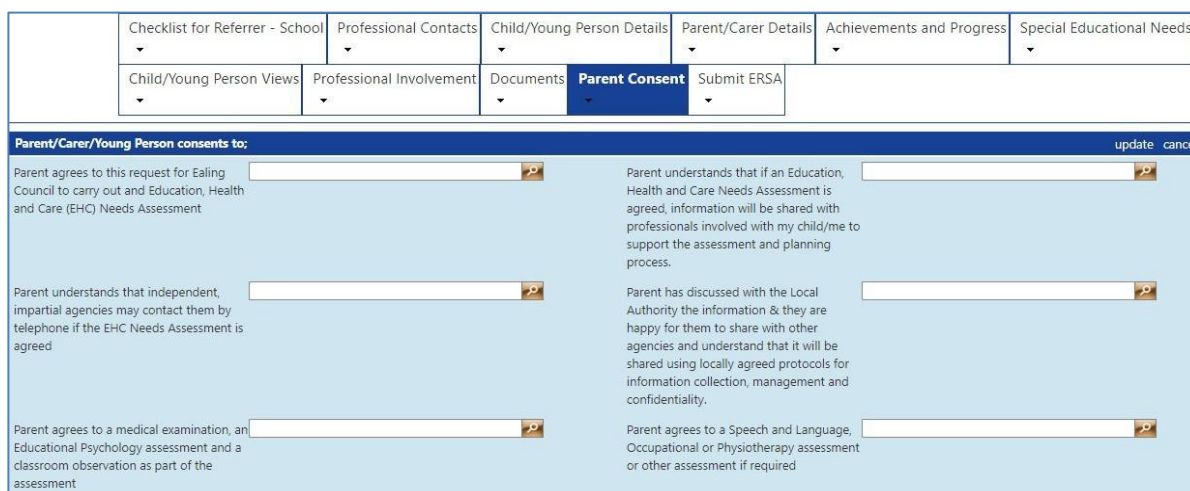
The screenshot shows a file selection dialog box with the text 'Select File to upload:'. There is a 'Browse...' button, an 'Upload File' button, and a 'Cancel' button.

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 options: Checklist for Referrer - School, Professional Contacts, Child/Young Person Details, Parent/Carer Details, Achievements and Progress, and Special Educational Needs. Below the menu, the 'Parent Consent' option is selected. The form contains several consent checkboxes with labels: '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 agrees to a medical examination, an Educational Psychology assessment and a classroom observation as part of the assessment', '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.', and 'Parent agrees to a Speech and Language, Occupational or Physiotherapy assessment or other assessment if required'.

## Obtain parent signature

Parents can add their name as a digital signature. We recommended 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.

<b>Optional</b>	edit
Parent agrees for the Local Authority to share their contact details with Ealing's independent impartial family services <input type="radio"/> Yes <input type="radio"/> No	
<b>Note</b>	edit
Please note that confidentiality will be broken when there are safeguarding concerns <input type="checkbox"/>	
<b>Parental Consent</b>	edit
Name: (By typing in your name, we accept this as your lawful signature) <input type="text"/> Date of Parent / Carer Signature <input type="text"/>	
<b>Section Checklist</b>	edit
Parent Consent - Section Complete <input type="radio"/> Yes <input type="radio"/> No	

## Parent portal communication preference

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

nts	Parent Consent	<b>Parent / YP Portal &amp; Communication</b>	Submit ERSA
	▼	▼	▼

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.

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

## Preview the ERSA

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.

<b>Education Request for Statutory Assessment (ERSA)</b>	
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	
<a href="#">Referrer Details</a>	
<b>This request was completed with the consent of the family and/or young person:</b>	
Referrer's Name	
Job Title	SENCO

## Submit the ERSA to SENAS

**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

run report cancel

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

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	<b>Submit ERSA</b>	

**Section Checklist** edit

Checklist for Referrer - Section Complete	<input checked="" type="radio"/> Yes <input type="radio"/> No	Professional Contacts - Section Complete	<input checked="" type="radio"/> Yes <input type="radio"/> No
Child/Young Person Details - Section Complete	<input type="radio"/> Yes <input type="radio"/> No	Parent/Carer Details - Section Complete	<input type="radio"/> Yes <input type="radio"/> No
Achievements and Progress - Section Complete	<input type="radio"/> Yes <input type="radio"/> No	Special Educational Needs - Section Complete	<input checked="" type="radio"/> Yes <input type="radio"/> No
Child/Young Person Views - Section Complete	<input type="radio"/> Yes <input type="radio"/> No	Professional Involvement - Section Complete	<input type="radio"/> Yes <input type="radio"/> No
Document History - Section Complete	<input type="radio"/> Yes <input type="radio"/> No	Parent Consent - Section Complete	<input type="radio"/> Yes <input type="radio"/> No

Submit ERSA run report edit

**Report Saved** pop-up window confirms the report was saved in **Documents** tab.

**Report Saved**

ERSA - School (VNOV22) ERSA-School(VNOV22) 16032023153516 saved to Document History

ok

## Check the ERSA has been uploaded

Select the **Documents** tab and 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. If you do not then email [ERSA@ealing.gov.uk](mailto: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	<b>Documents</b>	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:

**Document List** Page 1 of 1 delete refresh show all document history

Title	Document Name	Date Uploaded	Document Category	Document Sub Category	Modified Date	Modifying User
ERSA - School (VNOV22) ERSA-S...	ERSA-School(VNOV22)_1603202...	16/03/2023	SEND (Portal)	Ealing Request for Statutory Ass...	16/03/2023 15:35:16	LBEALING-TC\PerrinoE

## Start an Appendix B (SENCO Advice)

Appendix 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

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

## Add an outcome

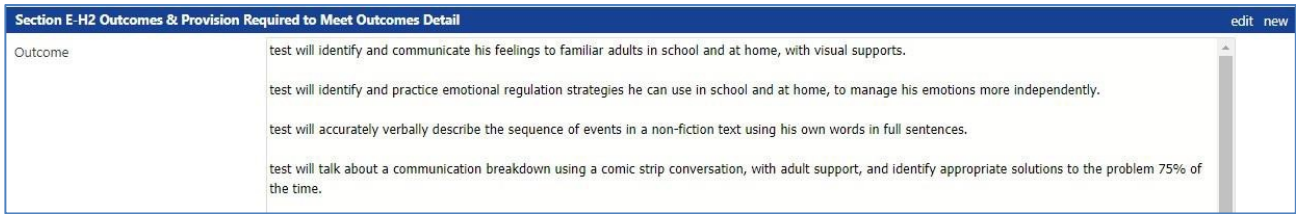
The outcome section is available at the end of every professional report. To read all outcomes added by various professionals double click on the outcome title from the left column. SENCO's may wish to add an outcome but this is not compulsory.

**Section E-H2 Outcomes & Provision Required to Meet Outcomes List** Page 1 of 2 delete refresh

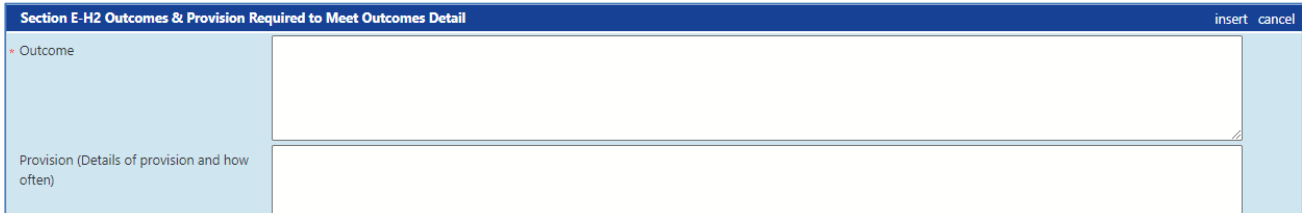
Outcome	How will progress be monitored?	Outcome Type and Team
for test to be able to regulate his emptions and reduce his violent out...	Termly	Social Care - H1
Test will accurately verbally describe the sequence of events in a non-f...	Termly- up to 45 minutes per term	SLT - Comms
Test will identify 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		
iusegfg	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
Test_Wednesday20th will be able to demonstrate understanding of 3 f...	Annual review report or attendance at annual review meeting. Reviewi...	SLT - Comms
Develop his social understanding and compliance	delivered on a daily basis	EP - SEMH

12

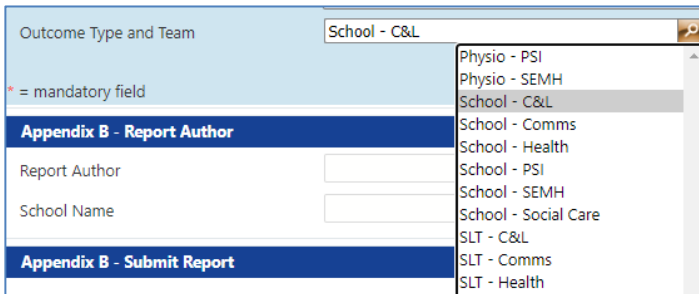
By default, the most recent outcome will display first. To add an outcome, select **new**.



Complete each section and select **insert** to save your outcome.

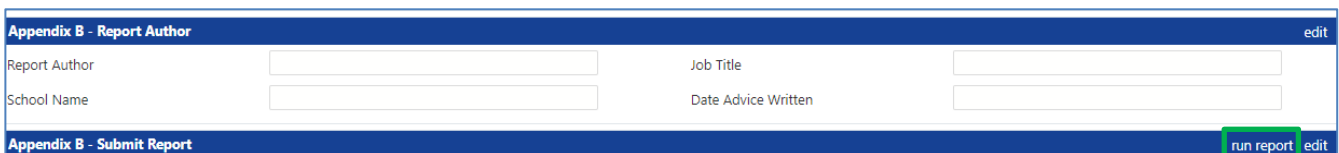


When selecting the outcome type/ team a drop-down menu will appear with the relevant agencies. This will indicate who wrote the outcome and who is responsible for it. For example, a cognition and learning outcome from an EP will look like this.

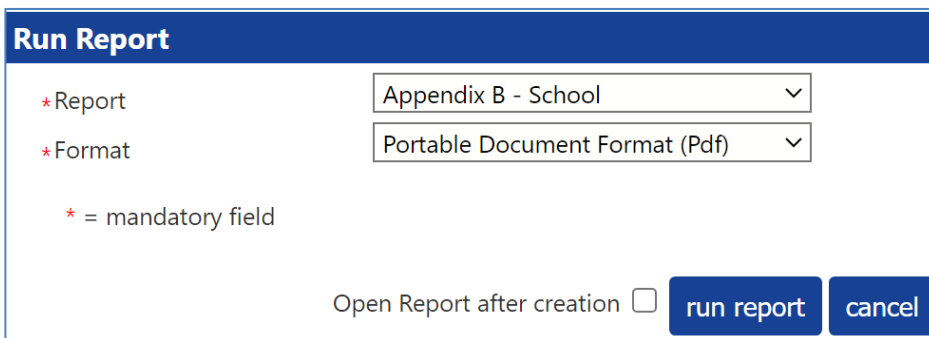


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To submit an Appendix B, complete the **Report Author** section, scroll to the bottom of the page and select **run report**.



In the pop up box select **Appendix B - School** and select on **run report** button



A Report Saved box appears letting you know the document has been saved in **Document History**. This means the Appendix B has been submitted into SENAS.

## Report Saved

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

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Appendix B - School Append... AppendixB-School\_2004202... 20/04/2023

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Appendix B - Headteacher

20/04/2023 14:49:21

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