

Ealing SEN Gateway

**Schools and SENCO Guide for Requesting and submitting advice for
Education Health and Care plans version 1.1**

September 2020

CHILDREN'S & ADULTS' SERVICES

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Logging in



Synergy

Sign In

Email address or user name

Password

[Forgotten your password?](#)

 Sign In

LIVE
Version 19.2.00505
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To access the gateway system you can follow this link

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

Ealing will have supplied you with a username and password already. These need to be populated in the relevant login sections of this screen.

Login part 2

If you are directed to this page after logging in. Press “gateway” to enter the main section.



Welcome to the Ealing Family Services Directory

For information on childcare and family services in neighbouring boroughs, please use the following links: [Brent](#), [Hillingdon](#), [Hammersmith and Fulham](#), [Hounslow](#), [Harrow](#).

All information has been provided by Ealing Family Information Service. If you can't find what you are looking for or you experience an error with the directory, please contact us:

- Telephone: 020 8825 5588 lines open 9am - 5pm Monday to Friday
- Email: children@ealing.gov.uk
- Office: Perceval House, 14-16 Uxbridge Road, Ealing, W5 2HL

It is recommended that you always check details with childcare providers or organisations before using their service; and where necessary, references and accreditation with awarding bodies or national organisations, to ensure their service meets your requirements. The Family Information Service offers an impartial service; therefore, we cannot recommend or endorse any of the childcare providers or organisations listed.

If you have any concerns at all about the quality or integrity of your childcare provider, you can contact the regulating body, OFSTED, on **0300 123 1231** or email enquiries@ofsted.gov.uk For more information on Ofsted, visit their website at www.ofsted.gov.uk

Alternatively, you can contact the Family Information Service on **020 8825 5588** or email children@ealing.gov.uk

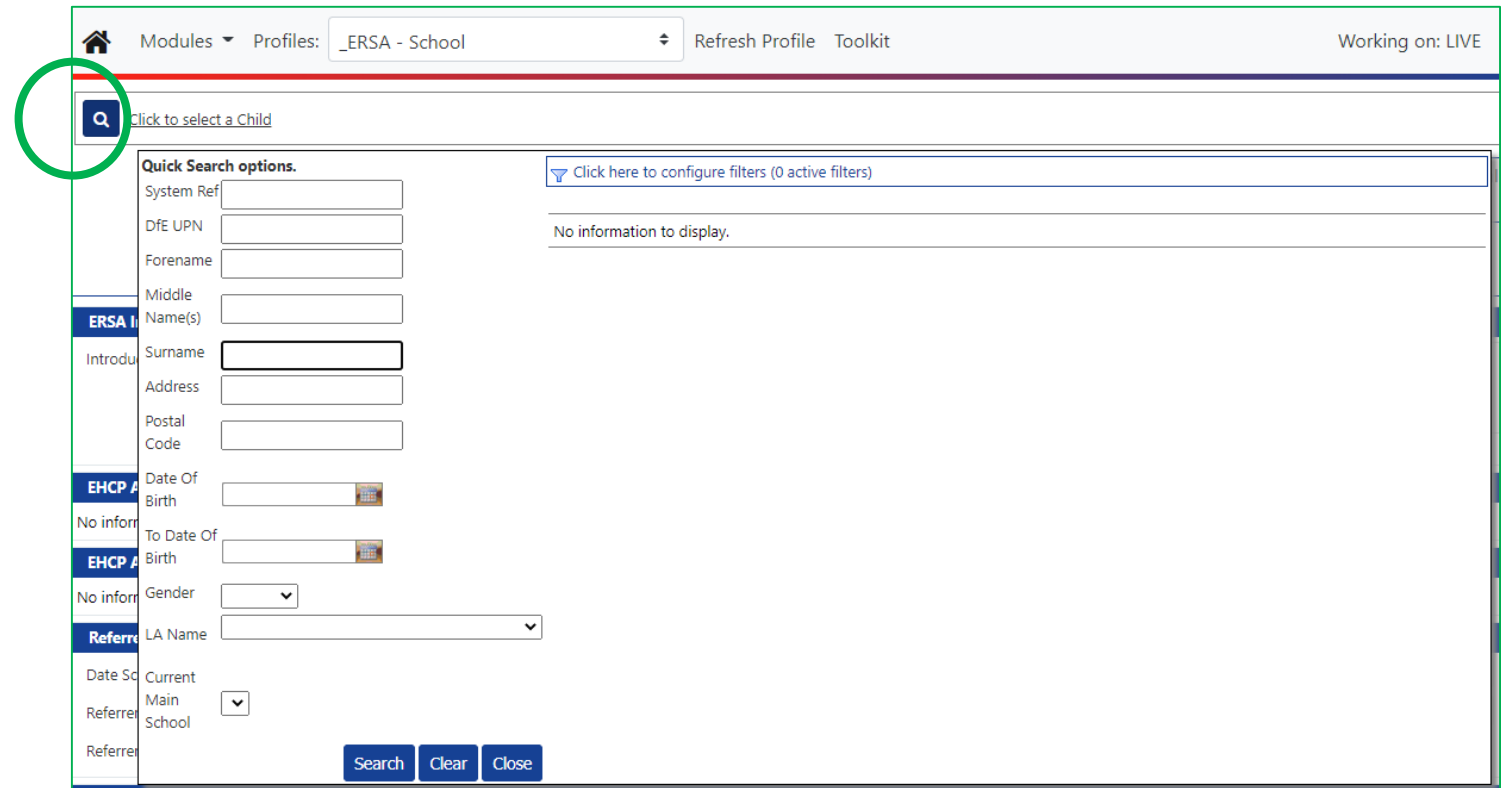
Navigating Gateway

The screenshot displays the 'Navigating Gateway' interface. At the top, there is a navigation bar with a home icon, 'Modules' dropdown, 'Profiles: _ERSA - School' dropdown, 'Refresh Profile' button, and 'Toolkit' button. On the right, it says 'Working on: LIVE' with a user profile icon 'MT'. Below this is a search bar with a magnifying glass icon and the text 'Click to select a Child'. A main navigation menu contains several tabs: 'Checklist for Referrer - School', 'Professional Contacts', 'Child/Young Person Details', 'Parent/Carer Details', 'Achievements and Progress', and 'Special Educational Needs'. Below these are sub-tabs: 'Child/Young Person Views', 'Professional Involvement', 'Documents', 'Parent Consent', and 'Submit ERSA'. The main content area has a blue header 'ERSA Introduction' and a sub-section 'Introduction' with a large empty text box. Below this are two sections: 'EHCP Assessment Progress' and 'EHCP Assessment Parts', each with a 'refresh' button and the text 'No information to display.'

This is the main navigation page of gateway. From here you can access child details and insert information.

Selecting a child

You can select a child's record by clicking on the magnifying glass located on the top left corner of the page.



The screenshot shows a web application interface for selecting a child's record. The top navigation bar includes a home icon, a 'Modules' dropdown, a 'Profiles' dropdown set to '_ERSA - School', a 'Refresh Profile' button, and a 'Toolkit' button. The user is logged in as 'Working on: LIVE'. Below the navigation bar is a search bar with a magnifying glass icon and the text 'Click to select a Child'. A green circle highlights this magnifying glass icon. Below the search bar is a 'Quick Search options' section with various input fields: System Ref, DfE UPN, Forename, Middle Name(s), Surname, Address, Postal Code, Date Of Birth, To Date Of Birth, Gender, and LA Name. There are also buttons for 'Search', 'Clear', and 'Close'. A link to 'Click here to configure filters (0 active filters)' is also present.

Logging in an ERSA

Quick Search options.

System Ref

DfE UPN

Forename

Middle Name(s)

Surname

Address

Postal Code

Date Of Birth

To Date Of Birth

Gender

LA Name

Current Main School

[Click here to configure filters \(0 active filters\)](#)

Page 1 of 1

Surname	Forename	Date Of Birth	Address	Postal Code	Gender	DfE UPN	NC Year
Test	Test	01/09/2002	21-22 Carmelita House The Mall	W5 2PJ	M		NC Year 13
TEST	TEST	01/01/2020	London Borough Of Ealing Perceval House 14 Uxbridge Road	W5 2HL	F		<Unknown>

Search returned 2 records - a maximum of 10 are displayed per page - Profile limits this search to 1,000 records

To complete an ERSA choose the relevant child double click the name to enter their record. For this guide we are using a 'Test' child name

The screenshot shows a web application interface. At the top left, there is a home icon, a 'Modules' dropdown menu, and a 'Profiles:' dropdown menu. The 'Profiles:' dropdown is currently open, showing a list of options: '_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', 'Appendix E - Social Care', 'Appendix F - HI', 'Appendix F - VI', and 'EHC Plan'. The '_ERSA - School' option is highlighted. Below the dropdown, there is a search bar with 'Surname : Test' and 'Forena'. To the left of the dropdown, there are several sections: 'Checklist fo', 'Child/Young', 'ERSA Introduction', 'EHCP Assessment Progress', 'Rule Name', and 'Generic Letter'.



Once you are in the record click on the drop down menu at the top left corner of the page. Selecting the “ERSA” option will take you to the main ERSA log page

Checklist for ERSA Referrer

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

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	

ERSA Introduction edit

Introduction

This is a new introduction and should be shown in App B intro.

this is a test.

EHCP Assessment Progress Page 1 of 1 refresh


Rule Name	Workflow Start Date	Workflow End Due Date	Status
Generic Letter	04/09/2020	04/09/2020	Complete
Education Health and Care Plan (Online)	20/07/2020	07/12/2020	Ongoing

EHCP Assessment Parts Page 1 of 1 refresh


Workflow Part Description	Part Start Date	Completion Due Date	Completion Date
Generic Letter	04/09/2020	04/09/2020	

This first section of the ERSA is designed to collect essential information on the student i.e full child details, parent details, GP details and UPN number.

Adding referrer details

	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
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				
ERSA Introduction								edit
Introduction		This is a new introduction and should be shown in App B intro. this is a test.						


Each section can be filled out by clicking on the “edit” button located at the right side of every editable section.

 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
--	-----------------	------------------	----------------------------	---------------	-----------	----------------------	---------------------

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	

ERSA Introduction update cancel

* Introduction



This is a new introduction and should be shown in App B intro.

this is a test.

* = mandatory field

Once you have clicked the “edit” button the section will change colour indicating which areas can be amended. Once you have completed the section click “update” this will save your work.

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 ▼	

Section B - Strengths & Special Educational Needs edit

App B - Cognition and Learning Strengths

- Test
- Test
- TEST

App B - Cognition and Learning Needs

Test is an able child but is currently working at about one year below expectation as he refuses to engage with his learning for much of the day.

His Chronological age is 9 years and 3 months. In recent assessments he scored high on word reading but low on comprehension and low on spelling. His number skills were average. His verbal and non-verbal scales are low.

Test finds it difficult to organise his belongings. He will carry many items in his hands rather than put them in his bag. His workspace is normally untidy with pencils and other stationary spread about.

App B - Communication Skills Strengths

- test
- test
- **test**

To complete an ERSA you will need to click on each box above and complete the sections inside. The section you are working on will be highlighted green. Edit and update each section as required. Here is an example of a completed “special educational needs” section.

Uploading additional information/ documents

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
Upload baseline measures for last year	<input type="radio"/> Yes <input type="radio"/> No	Uploaded any other relevant information <input type="radio"/> Yes <input type="radio"/> No

Document Upload		edit	new
Title	<input type="text" value="Test"/>	Document Name	<input type="text" value="leaflet.pdf"/>
Date Uploaded	<input type="text" value="23/09/2020"/>	<input type="button" value="Download File"/>	
Document Category	<input type="text" value="SEN"/>	Document Sub Category	<input type="text" value="EP Report"/>
Reason for Including the Information	<input type="text"/>		

Click on
“edit” to
add a new
document

If you would like to attach separate documents as part of the ERSA you can do this by entering the “documents” section at the top. This may be useful for non-verbal children.

Document Upload insert cancel

* Title	<input type="text"/>	Document Name	<input type="text"/>
Date Uploaded	<input type="text"/>	<input type="button" value="Upload New File"/>	
Document Category	<input type="text"/>	* Document Sub Category	<input type="text"/>
Reason for Including the Information	<input type="text"/>		

* = mandatory field

Fill in the relevant fields and select “upload new file” this will generate a small pop-up where you can access your computer files you wish to upload.

Servelec Synergy - Children's Services - File Upload - Internet Explorer

https://synergyweb.ealing.gov.uk/Synergy/Gateway/FileUpload.aspx?m=2&f=-1&mr=-1&mt=82&s=ctl00_ctl00_body_Cont

Select File to upload:

Click “browse” select you file from your computer, click on “open” at the bottom right corner, then click “upload file” to add you file to the system. Once this is done save your progress by clicking “insert”

Parental consent

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 ▼	

Parent/Carer/Young Person consents to:		update	cancel
Parent agrees to this request for Ealing Council to carry out an Education, Health and Care (EHC) Needs Assessment	<input type="text"/>	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.	<input type="text"/>
Parent understands that independent, impartial agencies may contact them by telephone if the EHC Needs Assessment is agreed	<input type="text"/>	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.	<input type="text"/>
Parent agrees to a medical examination, an Educational Psychology assessment and a classroom observation as part of the assessment	<input type="text"/>	Parent agrees to a Speech and Language, Occupational or Physiotherapy assessment or other assessment if required	<input type="text"/>
Parent agrees for the Clinical Commissioning Group (CCG) to be informed that a request for assessment has been received and if an Education, Health and Care Plan is issued	<input type="text"/>	Parent agrees for a copy of the Education, Health and Care Plan to be sent to the child/young person's GP.	<input type="text"/>

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

Obtaining parent signature

Optional	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	
Note	edit
Please note that confidentiality will be broken when there are safeguarding concerns <input type="checkbox"/>	
Parental Consent	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"/>
Section Checklist	edit
Parent Consent - Section Complete <input type="radio"/> Yes <input type="radio"/> No	

Although parents can add their name as a digital signature, it is recommended that you either print this page and obtain a handwritten signature or upload the consent form you currently use as part of the ERSA.

Submitting 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 ▼	

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

Before submitting tick off that you have covered every section of the ERSA. Once you have done this you can run the report by clicking on the bottom on the bottom right corner

Submitting ERSA

Run Report

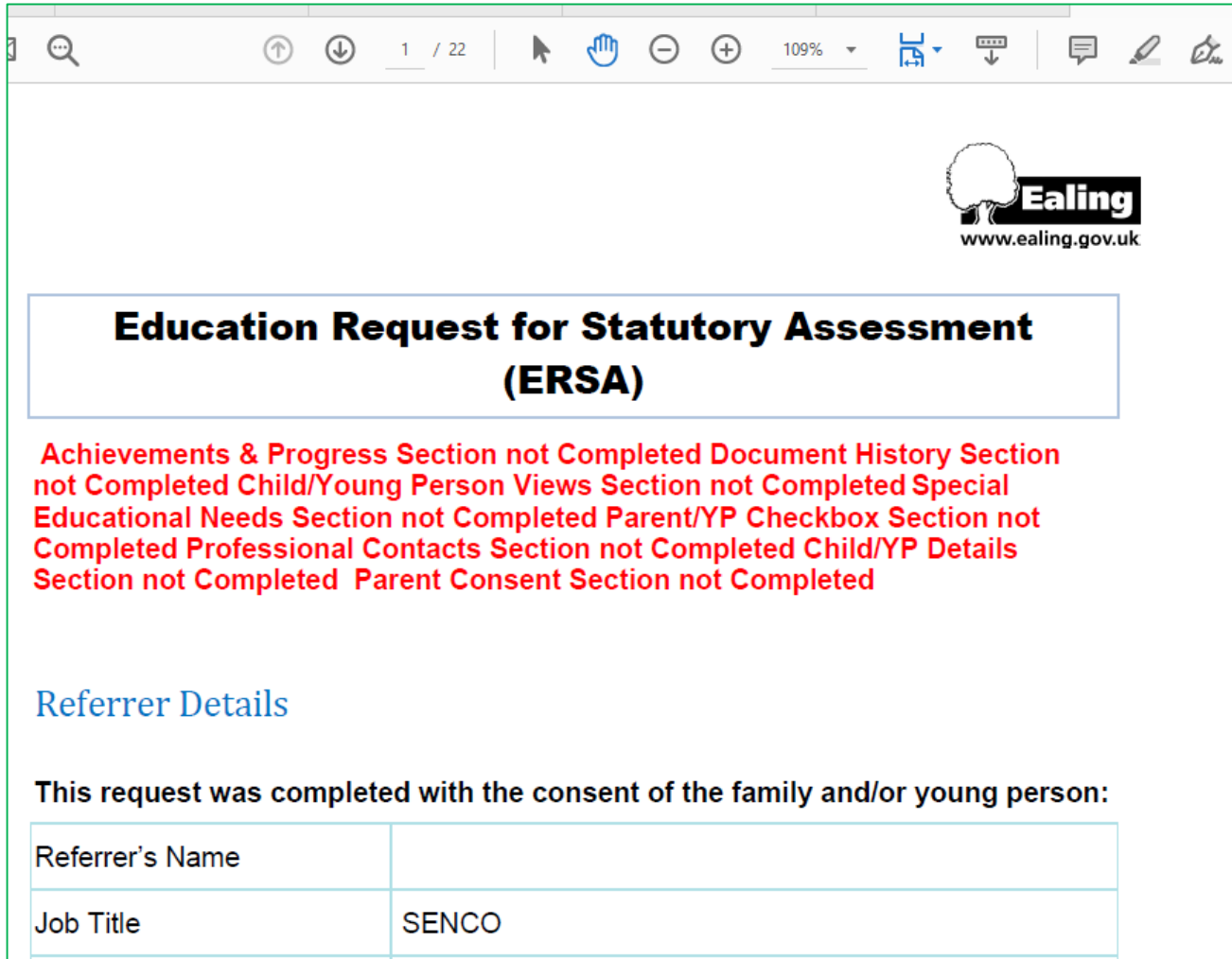
* Report

* Format

* = mandatory field

Professional Involvement - Section

Pressing on “run report” will produce a pop-up box with a drop down menu where you can either run a preview of your document or run a final version. Select “run report” again in this new pop-up box to produce your document.



Education Request for Statutory Assessment (ERSA)

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

Referrer Details

This request was completed with the consent of the family and/or young person:

Referrer's Name	
Job Title	SENCO

Your final ERSA will be downloaded and available for you in a PDF format.

If any sections have been missed out of the ERSA you will get an alert in red stating which section need updating.

Do's and Don'ts

- Liaise with parents when making outcomes
 - Run ERSA/ reports as preview first
 - Save regularly
 - Ensure GP details are entered before submitting
- Don't submit a report without double checking it
 - Leave your work station without signing off
 - Share login details with other people/ parents

Adding in professional report/ appendix B

Home 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

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

Once you have selected the relevant report you have access to the ribbon will change colour highlighting which section you are editing.

Adding an outcome

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 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	
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

The outcome section is available at the end of every professional report. You can read all outcomes which have been added by various professionals by double clicking on the outcome of your choice on the left column. SENCO's may wish to add an outcome, this is not compulsory.

Section E-H2 Outcomes & Provision Required to Meet Outcomes Detail		edit	new
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 always show up first. To add a new outcome press the “new” button on the top right corner of the section.

Section E-H2 Outcomes & Provision Required to Meet Outcomes Detail insert cancel

* Outcome

Provision (Details of provision and how often)

How will progress be monitored? Responsible Agency

Who will provide support

Outcome Type and Team

* = mandatory field

Once you have clicked “new” a blank outcomes table will appear. You will have to complete each section accordingly. When you are finished click “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

* = mandatory field

Appendix B - Report Author

Report Author

School Name

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

Finalising a report

Appendix B - Report Author		edit	
Report Author	<input type="text"/>	Job Title	<input type="text"/>
School Name	<input type="text"/>	Date Advice Written	<input type="text"/>

Appendix B - Submit Report		run report edit	
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When you have finished entering all the information and have added your name as the author go to the very end of the web page and click “run report”

Run Report

* Report

* Format

* = mandatory field

This pop up box will appear providing the name of the report being submitted and let you choose the format you wish to submit in. PDF is the default and preferred option to use. Word Document (doc.) is also available. Click “run report2 to submit document and finalise work.

Personal Budget and allocated funding

Profiles: EHC Plan Refresh Prof

TEST Forename : TEST Middle Name(s) : Date Of Birth : 01/01/2016 Gender :

Child/Young Person Details	Parent/Carer Details	Section A - All About
Cognition & Learning	Communication Skills	Social Emotional and Me
Section C - Health Information	Section D - Social Care Information	Se
Section I - Educational Setting	Section J - Personal Budget	Section
EHCP Sign and Submit		

Once an EHCP has been agreed and funding has been provided by the LA it can be viewed live in gateway. Make sure you are in the "EHC Plan" profile and select the "Section J" personal budget tab.

The information will be available in a read only format.

Personal Budget and allocated funding

Home Modules ▾ Profiles: Appendix B Refresh Profile Toolkit Wor

Search Surname : TEST Forename : TEST Middle Name(s) : Date Of Birth : 01/01/2016 Gender : Female DfE UPN : NC Year : Nursery 1

Appendix B - Education	Documents	Appendix A	Appendix C - Joint Health Form	Appendix C - CAI
Appendix C - CTPI	Appendix C - Nursing	Appendix C - GP	Appendix D - EP	Appendix E - Social Ca
Appendix F - VI	Appendix C / F - Other Professionals			

SENCO's can now view the provision allocated to a child by selecting on the "Appendix B" module and pressing into "Appendix B" tab

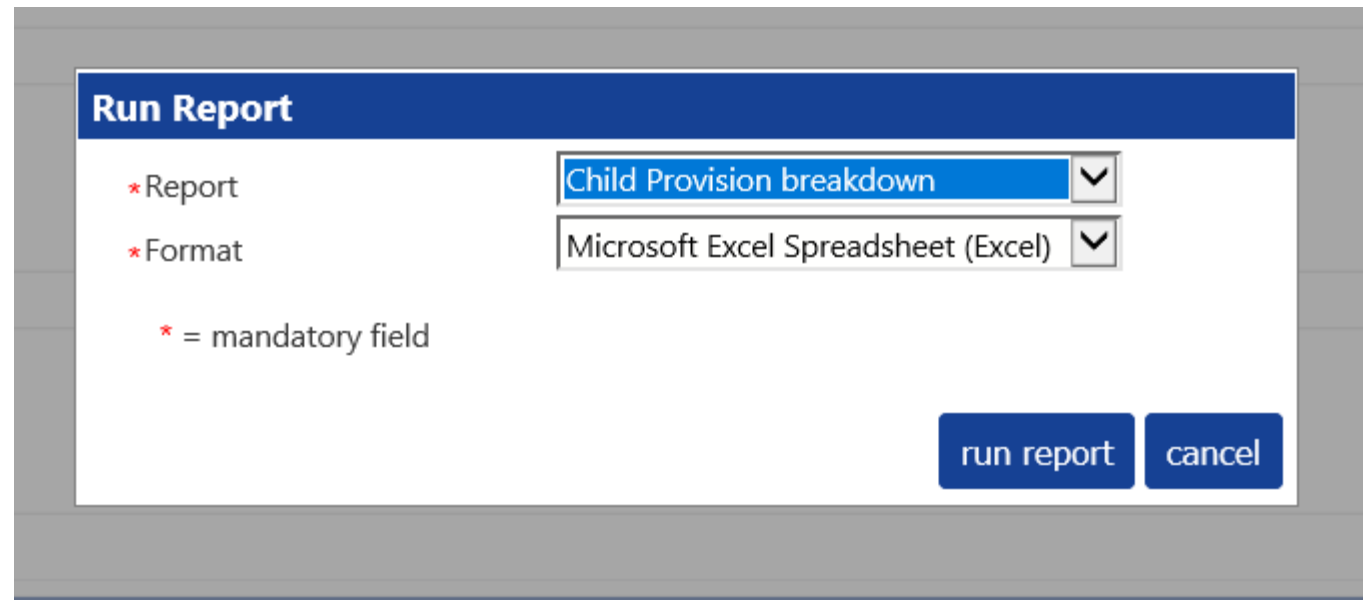
Personal Budget and allocated funding

Once the correct section has been selected you can scroll down to the “child provision” section to view the current provision assigned to the current school. This will be available in a read only format. This screen only contains the full annual costs and does not include the Pro Rata or Monthly Breakdown.

Child Provision List		refresh	
No information to display.			
Child Provision Detail			
Provision	<input type="text"/>	School	<input type="text"/>
Financial Year	<input type="text"/>	Start Date For Provision	<input type="text"/>
End Date For Provision	<input type="text"/>	Full Year Provision cost	<input type="text"/>
Total Cost	<input type="text"/>		
Notes	<input type="text"/>		

Child provision breakdown

SENCO's can view the full detailed provision. A report can be generated through the App B submission tab. A school can run a report for Pro Rata and monthly costs:



Run Report

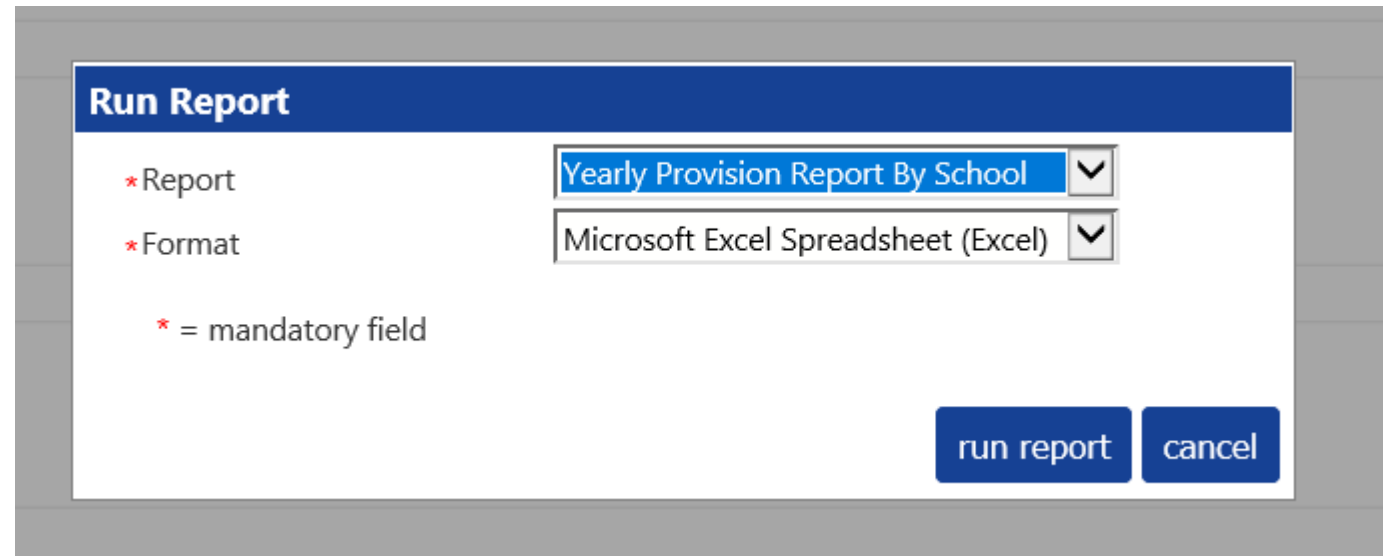
* Report

* Format

* = mandatory field

Yearly Provision Report by School

SENCO's can now view all provisions for children who have a current main attendance at their school. This is also generated from the "run report button" in the App B tab.



Run Report

* Report

* Format

* = mandatory field

Further help

If you require further assistance or are experiencing technical difficulties please contact Ealing Education ICT via email EalingEducationICT@ealing.gov.uk

Where a dedicated member of staff will assist you with your query.

Thank you for continuing to support the development of your Local Authority