

# SEND Professional Portal Administration Handbook

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Handbook

# CAPITA

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#### **Contacting One Application Support**

You can log a call with One Application Support via the Customer Service tool available on <u>My Account</u>.

#### **Providing Feedback on Documentation**

We always welcome comments and feedback on the quality of our documentation including online help files and handbooks. If you have any comments, feedback or suggestions regarding the module help file, this handbook (PDF file) or any other aspect of our documentation, please email:

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Please ensure that you include the document name, version and aspect of documentation on which you are commenting.

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# **01** | Professional Portal Administration

## **Overview**

The **One Professional Portal** is a secure online gateway provided by the Local Authority enabling professionals to self-register and then provide information to the Local Authority about the children they work with.

The **Professional Portal Administration** (**Prof. Portal Admin**) functionality is available to Local Authorities in One v4 Online, subject to a licence and v4 Client permissions.

For local authorities, it enables staff to manage its users and verify the professionals working with children in their local authority.

The Professional Portal enables local authority teams to view filtered lists of the portal applications and the details of each application.

#### More Information:

Deploying and Configuring the One Professional Portal for Local Authorities technical guide, available from the **One Publications** website via the **Technical** link.

## **Using this Handbook**

This hand book is intended for One Administrators at the Local Authority. It describes the following administration processes performed by the local authority:

#### Administration | General Administration

- Portal Configuration
- Tile Management
- SEND Portal Configuration
- Edit Resources
- Template Management
- Cache.
- Local Authority
  - User Management
  - Verify Professional.

At the end of this handbook, there is a section explaining how the professional completes and submits a form and submits it to the local authority. For more information, see <u>Completing and</u> <u>Submitting a Professional Portal SEND Form</u> on page 59.

# **Updated Documentation**

## **Portal Messages**

This handbook has been updated to explain the Portal Messages functionality.

LAs can create alerts that send Portal messages to Portal users that are authenticated on a child or young person's involvement.

#### More Information:

Portal Message Alerts on page 26.

Frequently Asked Questions on page 65.

### FAQs

A section for frequently asked questions has now been included in this handbook.

More Information:

Frequently Asked Questions on page 65.

# **02** | Managing Users

## **Professional Portal Administration**

In order to be a Professional Portal administrator, you must satisfy the following conditions:

- In One v4 Client you must:
  - be set up as a user.
  - have a valid email address.
  - belong to a dataset.
  - belong to a group.
  - be mapped to a One person.
  - have group permissions set.
- In One v4 Online:
  - your LA must have a Professional Portal licence key.

#### More Information:

Deploying and Configuring the One Professional Portal for Local Authorities technical guide, available from the **One Publications** website via the **Technical** link.

## Logging in to One v4 Online

To log in to One v4 Online, you need to obtain a v4 Online licence key from Distribution. You must also be set up as a user in the One v4 Client.

1. Open the **Login** screen by clicking the link to the One Online web server, set up by your System Administrator.

CAPITA   one
Login
If you are authorised to do so, please log in
User Name
Password
Login Change Password
Version No.: 4.351.3.12708 Copyright © 2013 Capita. All rights reserved, worldwide.

- 2. Enter your One User Name.
- Enter your **Password**; this is the same as your One password. Passwords are case sensitive. To change your password, see <u>Changing a Password</u> on page 4.
- 4. Click the Login button to display the Welcome to One page.

#### Managing Users

CAPITA   one		
Welcome to One Please use the F11 key to enable Full Screen	operation of your browser window.	
CSS Go	overnors B2B:Student	Exclusions
A&T Application A&T F	Preferences Administratio	n A&T Back Office
Bases App	plications Portal Back Off	ice Citizen Portal Admin
Prof. Portal Admin Trainin	ng Manager Music Tuition	Transport Back Office

The **Welcome to One** page displays the options that are available to you, subject to a licence being held by your Local Authority and your personal or group permissions.

#### More Information:

*RG\_Online\_Administration\_Login\_Logout* available from the **One Publications** website via the **Reference Guides** link.

#### **Changing a Password**

To change your password in v4 Online:

1	Login
If you are a	uthorised to do so, please log in
User Name	
Password	
	Login Change Password

1. Click the **Change Password** button on the **Login** screen to display the **Change Password** dialog.

Change	Passwo	rd	
Old Password			
New Password			
Confirm New Password			
		Ok	Cancel

- 2. On the Change Password dialog, enter your Old Password.
- 3. Enter your New Password.
- 4. Enter your new password again in the Confirm New Password field.
- 5. Click the OK button.

#### More Information:

*RG\_Online\_Administration\_Login\_Logout* available from the **One Publications** website via the **Reference Guides** link.

#### **Forgotten Password**

If you have entered an incorrect email address or password, the following message is displayed:

There were problems logging you in.

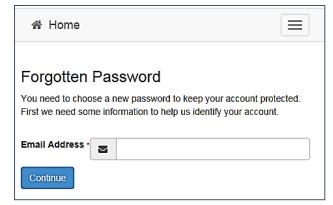
Email Address/Password is incorrect. Please try again.

Check that you have entered the correct email address. If you have forgotten your password it will need to be reset.

Hom	ne
The	re were problems logging you in
	Email Address/Password is incorrect. Please try again.
Don't I	nave an account? Please register
Email	Address
2	Portal06@onetestsmtp.co.uk
Passw	vord
a,	

To reset a password:

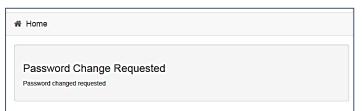
1. Click the Forgotten your password? link to display the Forgotten Password dialog.



2. Enter your email address, then click the **Continue** button to display the **Secret Question** dialog.

*	Home
-	ootten Password ver Secret Question
Secre	t Question Month of Birth
Secre	t Answer
Sub	mit

3. Enter the **Secret Answer** you provided when registering, then click the **Submit** button. A message informs you that a password change has been requested.



4. The Local Authority will send an email, similar to the one below, to the registered email address.

Dear
You have chosen to reset your password, to enable you to login to the
In order to complete this process, you must login again using the new password you have chosen.
If you can see a link below, you may click on this to open our service, otherwise please copy and paste the text into your Internet browser.
https://one-
Kind regards,
Administrator
IMPORTANT - PLEASE DO NOT REPLY TO THIS EMAIL AS IT MAY NOT GO TO YOUR LOCAL AUTHORITY. TO CONTACT US, PLEASE SEE THE DETAILS BELOW:
Contact Us

5. Click on the link in the email to access the Citizen Portal website.

Diste 1090	Citizen Portal
# Home	🛦 Login 🕼 Register
Please enter a new password	rd
A Passing	
Confirm Password	
6 Confirm Password	
Submit	

- 6. Enter your new **Password**. Passwords are case sensitive.
- 7. Enter your new password again in the Confirm Password field.
- 8. Click the **Submit** button. A message confirms that you have successfully changed your password.

2Ste logo	Citize	n Porta	1
# Home	🛦 Login	(# Register	
Password Changed Password changed successfully Please click on the Login button to log in to the sile.			

9. Click the Login button to log in to the Citizen Portal with your new password.

## Logging in to Professional Portal Admin

The **Professional Portal Administration** (**Prof. Portal Admin**) functionality is available in One v4 Online. To use the Prof. Portal Admin module, you must have a One user account that meets the following conditions:

- Your user account has a valid email recorded against it.
- Your user account is mapped to a person in One.
- Your user account belongs to user group with the appropriate permissions assigned.

Your System Administrator will have set up the Professional One Portal licence key and your permissions via v4 Client | Tools | Permissions | User Group Permissions.

To log in to the One Professional Portal Admin:

1. Log in to v4 Online. For more information see Logging in to One v4 Online on page 3.



2. Click the Prof. Portal Admin button to display the Announcements page.

Advance Notification of system downtime All Portal users should be aware that the system will be offine,	100 100
and high and high a first installer. The of allows all and a reason a test is the second a set for solid birs and a second and and and a set of the second and a second and a second as a	
the story with a balance of the second of th	Contract of
na provinsi na na mana ina a fara a na sina a mana mana ini alia mana ma milana ini minangi na mi si milana ini Mana mana ai ana mana mana ina ka ma mana mana ini alia mana ma milana ini milana ini minangi na mi si milana m	-
Continue	

- 3. The Announcements page displays only if there are announcements regarding the portal.
- 4. Click the **Continue** button to display the **Home** page.

Note: If there are no announcements, click the Prof. Portal Admin button to display the Home page.

#### More Information:

Deploying and Configuring the One Professional Portal for Local Authorities technical guide, available from the **One Publications** website via the **Technical** link.

## **The Professional Portal Home Page**

The Professional Portal Home page is divided into the following two sections:

- Administration for more information, see the <u>Home | Administration Page</u> section on page 8.
- Local Authority for more information, see the <u>Home | Local Authority Page</u> section on page 8.

These can be accessed by clicking on the buttons or selecting an option on the navigation bar.

The Professional Portal header displays the site logo. This is installed by the System Administrator when installing the Professional Portal.

Site logo	P	rofession	al Portal
Home	Local Authority -	Administration -	Sign Out

The Professional Portal footer displays the following links:

About	Contact Us	Terms and Conditions	Privacy Notice	Cookies Policy

About Us – displays information about the local authority. This text is formatted via One v4
 Online | Prof. Portal Admin | Administration | General Administration | Edit Resources |
 Resource Configuration Title | Markdown | Text Blocks | Site Notices\_About.

- Contact Us displays contact details such as address, phone numbers and email address. This text is formatted via One v4 Online | Prof. Portal Admin | Administration | General Administration | Edit Resources | Resource Configuration Title | Markdown | Text Blocks | Site Notices\_Contact.
- Terms and Conditions displays the terms and conditions for using the Professional Portal. This text is formatted via One v4 Online | Prof. Portal Admin | Administration | General Administration | Edit Resources | Resource Configuration Title | Markdown | Text Blocks | Site Notices\_TAndC.
- Privacy Notice displays additional information regarding privacy. This text is formatted via One v4 Online | Prof. Portal Admin | Administration | General Administration | Edit Resources | Resource Configuration Title | Markdown | Text Blocks | Site Notices\_PrivacyNotice.
- Cookies Policy displays information regarding the cookies that are placed on the user's computer when logging in to the portal. This text is formatted via One v4 Online | Prof. Portal Admin | Administration | General Administration | Edit Resources | Resource Configuration Title | Markdown | Text Blocks | Site Notices\_CookiesPolicy.

# Home | Administration Page

The Administration page is accessed via v4 Online | Prof. Portal Admin | Home | Administration.

The **Home Administration** page enables the local authority to carry out the following general administration tasks:

- Portal Configuration
- Tile Management
- SEND Portal
- <u>Verification Settings</u> (deprecated)
- Edit Resources
- Template Management
- Cache.

# Home | Local Authority Page

The Local Authority page is accessed via v4 Online | Prof. Portal Admin | Home | Local Authority.

From here the administrator can manage users and verify professionals.

Clicking the **User Management** button displays the **User Management** page. For more information, see <u>User Management (Local Authority)</u> on page 9.

Clicking the **Verify Professional** button displays the **Verify Professionals** page. For more information, see <u>Verify Professionals (Local Authority)</u> on page 10.

# **User Management (Local Authority)**

The **User Management** page enables the administrator to view user details and to change the user's email address and password.

									] Lo	cal A	uthorit
User Management											
Enter part of First Name, Surname Or Email Addres	55										
sh Search											
247 Records found					<< Previous	1 2	2 3	3 4	5	> 25	Next >
	First Name ≑	Surname \$	Confirmed	View Details	<< Previous	1 2	2 3	3 4	5	× 25	Next >
Email Address 🗸	First Name \$	Surname \$	Confirmed	View Details View Details							
Email Address 🗸		Contraction of the local sector of the			Action	Email Ac	ddrei	ss   R	eset F	Passwo	ord
247 Records Jound Email Address - @mail.com @mail.com @mail.com	197	P. 21	~	View Details	Action Change E	Email Ad	ddre:	ss   R ss   R	eset F eset F	Passwo Passwo	ord
Email Address - @mail.com @mail.com	nya Jagina	PLAN.	* *	View Details View Details	Action Change E Change E	Email Ao Email Ao Email Ao	ddre: ddre: ddre:	ss   R ss   R ss   R	eset F eset F eset F	Passwo Passwo Passwo	ord ord ord

**Note:** If there are any errors reported when changing an email address or password, the record must be changed in the One v4 Client.

## **Viewing User Details**

To view a user's details:

- 1. Select v4 Online | Prof. Portal Admin | Home | Local Authority | User Management to display the User Management Search dialog.
- 2. Enter part of a first name, surname or email address, then click the **Search** button to display the list of local users that have registered for the One Professional portal.
- 3. Click the **View Details** link for the required user to display the **View Users Details** dialog. Details are displayed for Professionals and Children. You cannot make any changes.
- 4. Click the **Back** button to return to the **User Management** page.

## Changing a User's email Address

To change a user's email address:

- 1. Select v4 Online | Prof. Portal Admin | Home | Local Authority | User Management to display the User Management Search dialog.
- 2. Enter part of a first name, surname or email address, then click the **Search** button to display the list of users that have registered for the One Professional portal.
- Click the Change Email Address link for the required user to display the Confirm Email Update dialog. You are asked to confirm that you are resetting the email address for the correct account.
- 4. Enter the New Email Address.
- 5. Confirm the **New Email Address**.
- 6. Click the **Continue** button to return to the **User Management** page.

## **Resetting a User's Password**

To reset a user's password:

- 1. Select v4 Online | Prof. Portal Admin | Home | Local Authority | User Management to display the User Management Search dialog.
- 2. Enter part of a first name, surname or email address, then click the **Search** button to display the list of users that have registered for the One Professional portal.
- 3. Click the **Reset Password** link for the required user to display the **Confirm Password Reset** dialog. You are asked to confirm that you are resetting the password for the correct account.
- 4. Click the **Continue** button to return to the **User Management** page.

# Verify Professionals (Local Authority)

#### IMPORTANT NOTE:

This area is now deprecated. It is currently available so that administrators can view any historical requests for professional verification or any outstanding verification requests made before upgrading to the One Spring 2017 Release (3.62).

Sharing information between different portal users is still possible. However, it is now managed via the portal sharing functionality within the v4 Client.

#### MORE INFORMATION:

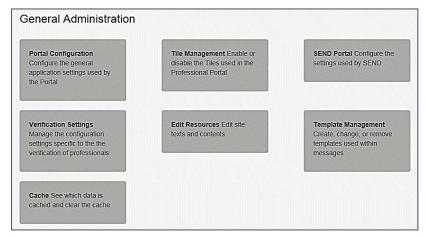
<u>Portal Sharing</u> on page 44. <u>Portal Message Alerts</u> on page 26. <u>Alerts</u> on page 46.

Adding Portal Sharing Users topic in the EHCP Involvements chapter of the One SEND handbook.

# **03** General Administration

## **Introduction to General Administration**

The **General Administration** page is accessed in One v4 Online via **Prof. Portal Admin | Home | Administration**.



The General Administration panels enable you to perform the following tasks:

- Portal Configuration configure the general application settings used by the portal. For more information, see <u>Portal Configuration</u> on page 12.
- Tile Management Enable or disable the tiles used in the Professional Portal. For more information, see <u>Tile Management</u> on page 12.
- SEND Portal Configure the settings used by SEND. For more information, see <u>SEND Portal</u> on page 13.
- Verification Settings Manage the configuration settings specific to the verification of professionals. For more information, see <u>Verification Settings</u> on page 14. (deprecated)
- Edit Resources Edit site texts and contents. For more information, see <u>Edit Resources</u> on page 14.
- Template Management Create, change or remove templates used within messages. For more information, see the following sections:
  - Template Management on page 17.
  - Creating a Template on page 18.
  - <u>Viewing Templates</u> on page 19.
  - <u>Professional Portal Administration</u> on page 20.
  - <u>Deleting a Template</u> on page 22.
- Cache See which data is cached and clear the cache. For more information, see <u>Cache</u> on page 22.

# **Portal Configuration**

An Administrator, with the appropriate permissions, can edit the **Portal Configuration** settings.

The Portal Configuration functionality is accessed via **One v4 Online | Prof. Portal Admin | Administration | General Administration**. Click the **Portal Configuration** tile to display the **General Configuration Settings** page.

Ma	nage the general configuration settings for the Professional Portal
Profess	ional Portal Base Url
From ac	ddress for outbound messages
The cur	rent school base group
Cance	Save

From here you can configure the following settings:

- Professional Portal Base URL Base URL used for communication purposes.
- From Address for Outbound Messages From email address for outward communications. This is sent to professionals to inform them of the local authority's email address. Although, it is generally accompanied by a 'please do not respond to this email address' message.
- The Current School Base Group Base group to use for the current school drop-down on the Add/Edit Child pages.

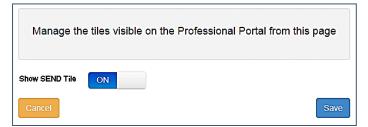
After you have entered the configuration details, click the Save button.

### **Tile Management**

The Administrator can switch the SEND tile on and off. This functionality is only available in the Professional Portal.

To access the Tile Management functionality:

- 1. Select One v4 Online | Prof. Portal Admin | Administration | General Administration.
- 2. Click the Tile Management tile.



- 3. Toggle the Show SEND Tile to ON or OFF as required.
- 4. Click the Save button.

## **SEND** Portal

An Administrator can manage the configuration settings specific to the SEND portal.

To configuration the SEND Portal settings:

- 1. Select v4 Online | Prof. Portal Admin | Administration | General Administration.
- 2. Click the SEND Portal tile

	_
Manage the configuration settings specific to the SEND Portal	
Send Dummy Base ID (Shared with Citizen Portal)	
SEND Form Submission Notification Email Addresses	
SEND Ad Hoc Professional Accept Message Template	
	~
SEND Ad Hoc Professional Reject Message Template	
	v
SEND Ad Hoc Professional Request Info Message Template	
	¥
SEND Verified Professional Request Info Message Template	
	¥
SEND Verified Professional Reject Message Template	
	¥
SEND Verified Professional Accept Message Template	
	v
Cancel	e

- 3. Enter a **SEND Dummy Base ID**. This is used by B2B to import SEND children and young people from the Professional portal.
- 4. Enter a **SEND From Submission Notification Email Address**. This is an email address or addresses for someone within the local authority, e.g. SEND Caseworker, to which an email is sent when a professional submits a form. It is simply a notification email.
- 5. Use the drop-downs to select the templates for various SEND messages. For more information, see <u>*Template Management*</u> on page 17.
- 6. Click the **Save** button.

# **Verification Settings**

**IMPORTANT NOTE:** This verification functionality is now deprecated. The settings remain to support legacy verification requests made prior to upgrading to the One Spring 2017 Release (3.62).

Sharing information between different portal users is still possible. However, it is now managed via the portal sharing functionality within the v4 Client.

#### MORE INFORMATION:

<u>Portal Sharing</u> on page 44. <u>Portal Message Alerts</u> on page 26. <u>Alerts</u> on page 46.

Adding Portal Sharing Users topic in the EHCP Involvements chapter of the One SEND handbook.

## **Edit Resources**

The Edit Resources functionality is accessed via One v4 Online | Prof. Portal Admin | Administration | General Administration | Edit Resources. From here you can edit the contents of the portal. The information in the tooltips is stored in the resource descriptions.

The following Resource Configuration Descriptions can be edited:

#### **Text Resources**

- Account
- Administration
- Home
- Home Tiles
- Local Authority
- Message
- SEND
- Shared

#### Markdown

Text Blocks

To find a particular resource description, open one of the **Resource Configuration Descriptions** then use the **Ctrl + F** keys on your keyboard to display the **Find** dialog. The entered text is highlighted on the page.

X Find: tooltip	Previous Next   📝 Options 🕶   31 matches
LoginEmailAddress_Toollip	Please enter the email address you used when registering
LoginPassword_Tooltip	Enter your password. Please remember this is case sensitive.

**Note:** You may need to search through more than one folder. For example, tooltips can be found in most of the resource configuration descriptions.

## **Editing Resource Descriptions**

The resource descriptions are individual dialogs that enable you to manage the text that is available to users in many areas of the Professional portal. If a **Resource Value** is changed via the **Edit Resource Title** dialog, then the next time a user sees that resource, the text will be updated to reflect the change.

To edit the resource descriptions:

1. Select Administration | General Administration | Edit Resources to display the Resource Configuration Title page.

Resource Configuration	Title	
Resource Configuration description		
Account •		
Clear resources cache		
efault Welsh (United Kingdom)		
Name	Value	

The default option is **English (en)**. Click the **Welsh (United Kingdom)** button to display the **Welsh (cy-GB)** descriptions.

2. Select an area from the **Resource Configuration Description** drop-down to display the descriptions and values associated with the resource types.

esource Configuration description		
*		
Clear resources cache		
ault Welsh (United Kingdom)		
auit Weisii (Onited Kingdoni)		
lame	Value	
ccountManagement_PageTitle	My Account	Edit
	Please select children for adding to Portal	
ddNonPortalChildren_Title	Please select children for adding to Portal	Edit
	Click to add new address	Edit
kddNonPortalChildren_Title Sutton_NewAddress Sutton_SaveChild		
Jutton_NewAddress	Click to add new address	Edit
- Button_NewAddress Button_SaveChild	Click to add new address Save Child	Edit
- utton_NewAddress lutton_SaveChild lutton_UsePreviousAddress	Click to add new address Save Child Use previous address	Edit Edit Edit

3. Click one of the Edit buttons next to a Value to display the Edit Resource Title dialog.

dit Resource Description	
Resource Type	Account
Resource Key	AccountManagement_PageTitle
Resource Culture	en
Resource Value	This is the only editable field.

The following fields are read-only:

- **Resource Type** the name of the resource configuration title.
- **Resource Key** the resource database name.
- **Resource Culture** en (English) or cy-GB (Welsh).

- 4. Enter your text in the **Resource Value** field.
- 5. Click the **Save** button to return to the **Resource Configuration Title** page to continue editing the resource descriptions.

#### **Configurable Email Text**

Portal administrators can now configure the text included with automatic emails, sent in response to the following actions in both the One Professional Portal and the One Citizen Portal:

- User indicates that they have forgotten their password.
- User changes their password.
- User changes their email address.
- User changes their secret question.
- Administrator resets a user's password (system sends forgotten password email to user).
- Administrator changes a user's email address (system sends a changed email address confirmation to user).

**Note:** Different text can be configured for the One Professional Portal and the One Citizen Portal versions of these emails.

This text can be configured by the portal administrator via **Professional Portal Administration** | Administration | Edit Resources | Resource Configuration Title | Text Resources | Account. Default text has been automatically configured for each.

To configure the subject lines for the different email types, type *emailsubject* into the **Search** box to filter the resource list to display the new configurable email subject items.

Resource Configuration Title		
Resource Configuration description		
Account		
Clear resources cache		
T emailsubject ×		
Default Weish (United Kingdom)		
Name	Value	
EmailSubject_EmailAddress_Changed	Change of email address - Citizen Portal	Edit
EmailSubject_Password_Changed	Change of password - Citizen Portal	Edit
	Password Reset - Citizen Portal	Edit
EmailSubject_Password_Forget		Edit
EmailSubject_Password_Forget EmailSubject_Registration	Citizen Portal activation	

To configure the contents for the different email types, select **Professional Portal** Administration | Administration | Edit Site Texts | Resource Configuration Title | Markdown | Text Blocks. Default text has been automatically configured for each.

Type *email\_* into the **Search** box to filter the list to display the new configurable content items for the different email types.

		Administrat
Resource Configuration		
Resource Configuration descriptio	n	
Clear resources cache		
Clear resources Lattie		
T email		
Default Welsh (United Kingdon	n)	
Name	Value	
Email_EmailAddress_Changed	You have chosen to change your email address to access the Citizen Portal. In order to complete this process, you must login again using the password you have chosen. [URL] Please note: If you are unable to click on this link, carefully copy and paste the text into your internet browser. Kind Regards, Portal Administrator Important - Please do not reply to this email as this account is not monitored.	Edit
Email_Password_Changed	You have changed the password you use to access the Citizen Portal. [URL] Please note: if you are unable to click on this link, carefully copy and paste the text into your internet browser.	Edit
	Kind Regards, Portal Administrator	

The configurable text block resource names are:

- Email\_EmailAddress\_Changed
- Email\_Password\_Changed
- Email\_Password\_Forget
- Email\_Registration
- Email\_SecretQuestion\_Changed.

## **Template Management**

The **Template Management** functionality is accessed via **One v4 Online | Prof. Portal Admin | Administration | General Administration | Template Management**. Templates are used to send notifications to professionals to provide information regarding their application.

In **Template Management** you can create, edit or remove templates stored within the portal. Placeholders can be inserted into the subject or the body of the template for the following entities:

SEND

- Professionals
  - Title
  - Forename
  - Surname
  - Professional Role
  - Organisation Name
  - Professional Address
  - Business Phone
  - Mobile Phone
  - Email Address.
- Subject

- Forename
- Surname.
- Message From Administrator.
- Current Date and Time.

## **Creating a Template**

To create a new template:

- 1. Select One v4 Online | Prof. Portal Admin | Administration | General Administration | Template Management.
- 2. Click the **Create Template** button to display the **Create Template** page.
- 3. Enter the **Template Name**.
- 4. Enter the **Subject** of the template.
- 5. If you wish to add a placeholder to the subject, click the **Add To Body** button to change it to **Add To Subject**, then choose one of the **Insert Placeholder** options.

	 Administration
Create Template	
Template Name	
h	
Subject	
•	
	Insert Placeholder -
Message ୬ ♥   3 臣   B I   汪汪淳寧   원, 3 콜 콜	How to Format
Preview	
Cancel	Save

- 6. Enter your text into the **Message** box. Alternatively click the **Add To Subject** button to change it to **Add To Body**, then choose one of the **Insert Placeholder** options.
- 7. Use the buttons at the top of the **Message** field to format your message. Your formatted message is displayed in the **Preview** field.

The buttons apply **Markdown** formatting, a text-to-HTML conversion tool for web writers. For more information, click the **How to Format** button.

		Administration
Create Template		
Template Name		
Subject		
•		
Message	✤ Add To Body	Insert Placeholder -
9 (*) 目目   B I   日日課課   8 通音		How to Format
# Header #		ń
Dear [\$\$Title\$\$][\$\$Sumame\$\$],		E
*Italic*		-
Preview		
Header		
Dear [\$\$Title\$\$][\$\$Surname\$\$],		
Italic		
Cancel		Save

8. Click the **Save** button to close the page and return to the **View Templates** page.

# **Viewing Templates**

To view an existing template:

1. Select v4 Online | Prof. Portal Admin | Administration | General Administration | Template Management button to display the View Templates page; existing templates are displayed.

	Administration
View Templates	
Manage all the templates stored Professional Portal - Verification Approved Template	
Professional Portal - Verification Rejected Template	
SEND - Ad hoc professional - Accept Template	
SEND - Ad hoc professional - Reject Template	
SEND - Ad hoc professional - Request Information Template	
SEND - Verified professional - Accept Template	
SEND - Verified professional - Reject Template	
SEND - Verified professional - Request Information Template	
Professional Portal - Verification Request Template	
Professional Portal - Verification Removed Template	

2. Click the template name to display the **Subject** and **Message** that are to be used in the message.

		Administration
View Temp		
Manage all the temp	lates stored	
Professional Portal -	Professional Portal - Verification Rejected Template	
Verification		
Approved	Subject	
Template	Professional portal - verification rejected.	
Professional	Message	
Portal -	Dear [\$\$Forename\$\$] [\$\$Surname\$\$]	
Verification Rejected		
Template	We have now considered your application for additional features for Professional Portal.	
SEND - Ad hoc	Unfortunately we cannot, at this time, approve your request.	
professional -	Regards	
Accept Template	LA Administration Team	
SEND - Ad hoc		
SEND - Ad noc professional -		
Reject Template	Edit	Delete

- 3. The template can be edited from here.
- 4. If you make any changes to the template, you must click the **Save** button

# **Editing a Template**

To edit an existing template:

1. Select One v4 Online | Prof. Portal Admin | Administration | General Administration | Template Management | View Templates.

	Administration
View Templates	
Manage all the templates stored	
Professional Portal - Verification Approved Template	
Professional Portal - Verification Rejected Template	
SEND - Ad hoc professional - Accept Template	
SEND - Ad hoc professional - Reject Template	
SEND - Ad hoc professional - Request Information Template	
SEND - Verified professional - Accept Template	
SEND - Verified professional - Reject Template	
SEND - Verified professional - Request Information Template	
Professional Portal - Verification Request Template	
Professional Portal - Verification Removed Template	

2. Select the required template then click the **Edit** button to display the **Edit Template** dialog.

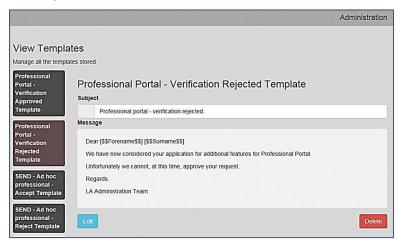
EC	lit Template		
Tem	plate Name		
li i	Template 1		
Sub	ject		
٠	[\$\$Forename\$\$][\$\$Surname\$\$]		
			Insert Placeholder -
Mes	sage		
-)	♥   当国   B I   田田祥祥   😪 🛛 🖶		How to Format
	ar (\$\$Title\$\$)(\$\$Surname\$\$) ank you for your application form.		
	d Regards Is CC		
Prev	view		
0	Dear [\$\$Title\$\$][\$\$Surname\$\$] Thank you for your a	application form.	
٢	Kind Regards Beds CC		

- 3. Edit the required fields; all of the fields on the Edit Template dialog can be edited.
- 4. Click the Save button.

## **Deleting a Template**

To delete an existing template:

- 1. Select One v4 Online | Prof. Portal Admin | Administration | General Administration | Template Management button to display the View Templates page.
- 2. Click the template name to display the **Subject** and **Message** that are to be used in the message.



3. Click the **Delete** button to remove the stored template; you must confirm the deletion.

# Cache

The cache is a temporary storage area used to speed up the retrieval of system information. The One system caches information that can take a long time to retrieve or require a large amount of memory. Sometimes issues can occur if the cached data is not updated when new data is entered into One. For example, a new child has been added, but is not displaying in the Professional portal. Clearing the cache forces a data refresh and displays the new data as expected.

The **Cache** page enables you to see which data is cached; cached data can be cleared from the system.

To clear the cache:

1. Select Administration | General Administration | Cache to display the list of cached items.

🔂 Adr	ministratio
Cache	
Key	Expires
CachedApplicationServerRepository_GetTranferGroupInfo_78	13:48:01

- 2. Click the **Clear Cache** button to remove the list of cached items. Cached items cannot be deleted individually.
- 3. Click the **Save** button.

# **04** | SEND Portal Administration

# Introduction to Special Educational Needs and Disability Portal Administration

The Special Educational Needs and Disability portals enable appropriate people to submit forms via the Citizen Portal or the Professional Portal, either for themselves or on behalf of a child/young person.

The forms for both the Citizen and Professional portals are created using the SEND Portal Form Builder in v4 Client. A form is created according to which portal and which role that form is appropriate for. A form must be marked as **Live** for it to display on the Citizen Portal or the Professional Portal. When logging into the Citizen or Professional portals, only the forms appropriate for that user are available. For more information, see <u>Using the SEND Form Builder</u> on page 27.

Professionals can self-register on the Professional Portal and then submit a form for a child or young person that they are working with. If they have previously submitted any forms to request an assessment, they will see a list of the children that they have submitted forms for. For more information, see <u>Completing and Submitting a Professional Portal SEND Form</u> on page 59.

Special Educational Needs and Disabilities (SEND) children and young people are imported using the same method as One B2B:Student. Before this import process can begin, a dummy base <u>must</u> be created as a B2B:Student Base. This can be done via **One v4 Client | Focus | Bases | Base Definition** or **One v4 Online | Bases**. For more information, see <u>Creating a</u> <u>Dummy Base (SEND Portal)</u> on page 25.

After a dummy base has been created a user is mapped to the dummy base. The User\_ID is used to identify that a record has been received from the Citizen Self Service portal.

Children are added to the SEND Dummy Base and then matched by the Local Authority via the **Portal Back Office** application, when a form for a child who has not previously been matched, or whose details have changed since they were last matched, is submitted via the SEND Portal. For more information, see <u>Matching Students (SEND)</u> on page 25.

The Portal Back Office application is accessed via One v4 Online.

#### More Information:

*Creating 'Dummy' Bases topic in the Deploying and Configuring the One Citizen Self Service Portal for Local Authorities technical guide, available from the One Publications website via the Technical link.* 

*Matching Students via One Portal Back Office* available from the **One Publications** website via **Handbooks | One Self Service**.

# **Permissions**

Permissions for SEND Portals are accessed in the One v4 Client via **Tools | Permissions | User Group Processes | User Group Processes Editor**.

1. Permissions for the SEND Portals are available under the **Main Business Process** of **SEND Portals**.

n Business cesses	SEND Portals		•		
Business Pr	ocesses	սենկենտերենեն		uhoha iuhoa iuhoha iuhoa iuhoha i	alanan ana ana ana ana ana ana ana ana a
Name		Read	Read-Write	Read-Write-Delete	Deny
Name SEND Po	ortals	Read	Read-Write	Read-Write-Delete	Deny
SEND Po	ortals rtals Management	Read	Read-Write	Read-Write-Delete	Deny V

These business processes control whether users can access the following areas:

- SEND Portals Management in One v4 Client via Focus | Services | SEND Portal Management. This controls whether the user can approve and reject SEND forms.
- SEND Form Builder in One v4 Client via Tools | Administration | Form Builder | SEND Portal Forms. This controls whether the user can set up the SEND Portal Forms.
- 2. Permissions for SEND Portals Forms are available under the Main Business Process of EHCP and SEND Portals Forms.

	Business EHCP and SEND Portals Forms	-			
) <b>2.</b> E	Business Processes				
	Name	Read	Read-Write	Read-Write-Delete	Deny
•	EHCP and SEND Portals Forms				Ý
	Access EHCP and SEND Portals Forms				Ý
	Complete EHCP and SEND Portals Forms and save				Ý
	Delete EHCP and SEND Portals Forms				Ý
	Set up EHCP Forms				Ý
	Unlock EHCP Form				Ì

These business processes control the following areas:

- Access to the SEND Portal Forms.
- Complete and save SEND Portal Forms.
- Delete SEND Portal Forms.
- 3. Permissions for the Professional Portal users are available under the **Main Business Process** of **Professional Portal**.

usiness Professiona ses	il Portal	•		
siness Processes				
Name	Read	Read-Write	Read-Write-Delete	Deny
Hamo				
Professional Portal				Ì
				I I I I I I I I I I I I I I I I I I I
Professional Portal				\$ \$ \$

These business processes control the following areas:

Administration – This permission controls the Professional Portal | Administration page, where the administrator can manage the following General Administration processes:

- Portal Configuration
- Template Management
- Edit Resources
- Cache.
- SEND Professional This permission is given automatically during the verification process. In order to access children's information, professionals must be linked to a One user (verified).
- User Management This permission enables the administrator to manage the local authority users.

#### More Information:

Permissions changes for this release available on the **One Publications** website.

## **Creating a Dummy Base (SEND Portal)**

To import SEND children and young people from the Professional Portal, a dummy base must be created as a B2B:Student Base and a user must be mapped to the dummy base to identify that a record has been received from the Professional Portal.

The User\_ID is used to update the **Last Updated** field in the relevant area of One, identifying that the record was sourced from the Citizen Self Service portal.

The dummy base should have been set up by the One Administrator for the User\_ID set up for processing SEND children and young people.

#### More Information:

*Creating 'Dummy' Bases* topic in the *Deploying and Configuring the One Professional Portal for Local Authorities* technical guide, available from the **One Publications** website via the **Technical** link.

## **Matching Students (SEND)**

Children are matched by the Local Authority via the Portal Back Office application. It is used to:

- Add new children to the One database.
- Match new children with existing children on the One database.
- Reject new children.
- Resolve conflicts e.g. changes to name, address or date of birth.

The Portal Back Office application is accessed via One v4 Online.

#### More Information:

*Matching Students via One Portal Back Office* available from the **One Publications** website via **Handbooks | One Self Service**.

## **Portal Message Alerts**

Portal messages are sent as alerts. They are used to keep parents, young people and professionals informed about SEND processes, e.g. if a person has been authenticated as a portal user or to request additional information. Only authenticated portal users on a child or young person's EHCP assessment involvement can receive portal messages.

Portal message templates are accessed via **One v4 Online | Prof. Portal Admin Administration | Template Management**. For more information, see <u>*Templates*</u> on page 26.

Portal Sharing users are authenticated in the v4 Client via Focus | People | Students | Student Details | Involvements | EHCP Assessment Involvement. For more information, see <u>Portal</u> <u>Sharing</u> on page 44.

Details of any information that has been requested, including details about the portal user who has requested the information is recorded in the v4 Client via Focus | People | Students | Student Details | Involvements | EHCP Assessment Involvement. For more information, see <u>Recording Information Requested</u> on page 45.

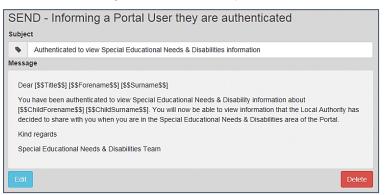
Portal message alerts are set up in the v4 Client via **Tools | Administration | Alert Definition**. For more information, see <u>Alerts</u> on page 46.

#### **Templates**

Portal message templates are accessed in the Professional Portal via Administration | Template Management | View Templates.

Two SEND message templates are available:

SEND – Informing a Portal User they are authenticated.



SEND – Reminder to submit information.

SE	ND - Reminder to submit information	
Subje	ect	
٠	Reminder to submit Special Educational Needs & Disability information	
Mess	age	
Yo	ear [\$\$Title\$\$] [\$\$Forename\$\$] [\$\$Surname\$\$] ou are required to submit information about [\$\$ChildForename\$\$] [\$\$ChildSurname\$\$] within the next 7 o nd regards	lays.
Sp	pecial Educational Needs & Disabilities Team	
Edi		Delete

You can edit the message templates or create your own. For more information, see <u>Editing a</u> <u>Template</u> on page 20 and <u>Creating a Template</u> on page 18.

# **05** | SEND Administration in v4 Client

# **Using the SEND Form Builder**

The form builder functionality enables each local authority to define questions to be used in form definitions, according to their own individual requirements.

A bank of existing questions is included to assist you with creating forms. New questions can be added to the bank of questions. A question can only be edited if it has <u>not</u> been used in a previous form definition.

When a SEND form is viewed via the Professional Portal or the Citizen Portal, the title is always prefixed with **Special Educational Needs & Disabilities**.

The SEND Portal Form Definitions are created in the v4 Client via Tools | Administration | Form Builder | SEND Portal Forms | SEND Portal Form Definitions. For more information, see <u>Creating a New SEND Portal Form Definition</u> on page 28.

The SEND Portal Form Questions are created in the v4 Client via Tools | Administration | Form Builder | SEND Portal Forms | SEND Portal Question Definitions. For more information, see <u>Defining New SEND Portal Question Definitions</u> on page 31.

**Note:** Forms that are created on the EHCP Form Builder are <u>not</u> available on the SEND Portal. However, the EHCP questions that are available in the question bank may be used on a SEND Portal Form Definition.

## Searching for a SEND Portal Form Definition

To search for an existing form definition:

1. Select Tools | Administration | Form Builder | SEND Portal Forms | SEND Portal Form Definitions to display the SEND Portal Form Definition Enquiry page.

SEND Portal Form Definit	ion Enquiry					\$	
👫 Search 🔁 Collapse 🔹							
1. Form Details							
Form Definition Code			Form Definition	Filter All	•		
New 💥 Delete 🖾 Oper	n 🔁 Open In New W	indow		us			
Title	Form Definition Code	Live	Portal Type	Portal User Type	Form Description	Form Guidance Notes	
		Yes	Citizen Portal	Parent/Carer			
	7	Yes	Citizen Portal	Parent/Carer		minorene pressure in a	
	EXC. BOTH	No	Citizen Portal	Parent/Carer			
		Yes	Citizen Portal	Parent/Carer			
		Yes	Citizen Portal	Young Person			
		Yes	Citizen Portal	Parent/Carer			
	100	Yes	Professional Portal		-		
		Yes	Professional Portal				
	10 10 10 10 10 10	Yes	Citizen Portal	Parent/Carer			
		Yes	Professional Portal		CENTER DECOM		
send001	send001	Yes	Citizen Portal	Parent/Carer	send001	send001	
		Yes	Professional Portal				
		Yes	Professional Portal				

- 2. If required, enter a full or partial **Form Definition Code** or select a **Form Definition Filter**. Only a 'live' form definition can be viewed on the Citizen or Professional portals.
- 3. Click the **Search** button to return all forms based on the selection criteria. Alternatively, clicking the **Search** button without a code or filter returns a list of all form definitions.
- 4. Select a form and click the **Open** or **Open in New Window** button to display the **Form Details** page for the selected form.

#### **Creating a New SEND Portal Form Definition**

The **SEND Portal Form Definition** page enables local authorities to create SEND Portal forms which are available on the Citizen and Professional portals for parents, carers, young people and professionals to complete, regarding special educational needs and disabilities (SEND).

**Note:** ACL's set at the Form Definition level are not applied in the SEND Portal Management area. This is so that incoming information is not missed. These ACL's are applied if the form is approved to appear on a Student's Chronology in One v4 client.

To create a new SEND Portal Form Definition:

- 1. Select Tools | Administration | Form Builder | SEND Portal Forms | SEND Portal Form Definitions to display the SEND Portal Form Definition Enquiry page.
- 2. Click the **New** button to display the **SEND Portal Form Definition** page.

SEND Portal Form De	finition []				×
💾 Save 🌍 Set ACL 🖸	one				
🐼 🐼 1. Form Details	2. Form Questions			1. Form Details	• 9
1. Form Details					
Note:	The title of this form wi	ll always be pr	efixed with 'Special Edu	cational Needs & Disabilities	
Title					^
Subtitle					
Subline					
Form Definition Code			Live	V	E
Portal Type			Portal User Type		
Form Description					
Form Guidance Notes					
Form Guidance Notes					^

- 3. Enter the information on the Form Details panel as follows:
- **Title**: The title is displayed on the portal.
- **Subtitle**: The subtitle does not display on the portal.
- **Form Definition Code**: Use a suitable numbering system for your SEND portal forms.
- If you wish the form to be visible on the Citizen or Professional portal, select the **Live** check box.
- **Portal Type**: Citizen Portal or Professional Portal.
- Portal User Type: This field is greyed out if Professional Portal has been selected. For Citizen Portal, select Parent/Carer or Young Person.
- Form Description: This text does not display on the portals.
- Form Guidance Notes: Enter text to assist users filling in the form. The guidance notes are displayed on the portal and the printout. For more information, see <u>Printing SEND Forms</u> on page 42.
- 4. Click the **Save** button. A message at the bottom of the screen informs you that the form definition has been saved.

### **Cloning a SEND Portal Form Definition**

You can duplicate (clone) and then amend an existing form definition. Cloning creates a copy of the original form definition, showing the existing **Form Definition** details. You can change the details to reflect the new form definition and modify the questions required. If a question has previously been used in a form definition that has been saved to a student's chronology, it <u>cannot</u> be amended.

To clone a SEND Portal Form Definition:

1. Select Tools | Administration | Form Builder | SEND Portal Forms | SEND Portal Form Definitions to display the SEND Portal Form Definition Enquiry page.

SEND Portal Form Definitio	on Enquiry					×		
1. Form Details	1. Form Details							
Form Definition Code			Form Definition	Filter All	-			
New X Delete S Open	Cpen In New W	indow	😽 Next   Previo	us				
Title	Form Definition Code	Live	Portal Type	Portal User Type	Form Description	Form Guidance Notes		
		Yes	Citizen Portal	Parent/Carer				
		Yes	Citizen Portal	Parent/Carer				
		Yes	Professional Portal					
send001	send001	Yes	Citizen Portal	Parent/Carer	send001	send001		
		Yes	Professional Portal					
		Yes	Professional Portal					

- 2. If required, enter your search criteria, then click the **Search** button to display forms that meet your search criteria.
- 3. Double-click the required form definition to display its details.

SEND Portal Form De	finition [SEND Portal Referment	I Application 01]			×
💾 Save 😚 Set ACL 🛛 CI	one				
🔇 📀 1. Form Details	2. Form Questions		1. Form Details	•	1
1. Form Details					
Note:	The title of this form will alway	rs be prefixed with "Special Educat	ional Needs & Disabilities'		
Title	SEND Portal			•	
				-	
Subtitle	Citizen Portal - Parent/Carer			^	
				-	E
Form Definition Code	SENDP	Live	V		
Portal Type	Citizen Portal	<ul> <li>Portal User Type</li> </ul>	Parent/Carer -		
Form Description	The loss is it into equilation	ana akina mpiniki in n		*	
				•	
Form Guidance Notes	Contracting with its out			*	

- 4. Click the **Clone** button to make an editable copy of the form definition.
- 5. On the **Form Details** panel, make the required changes to the cloned form definition. It is recommended that you re-name the **Title** and enter a new **Form Definition Code** to assist identification.
- 6. If required, you can amend the questions and the question groups in the **Form Questions** panel.

uestion Selector			
Down 👚 Up 🕥 Actions 🗸	🕥 Actions 🗸		
	Question Code	Description	_
e		S	
	R. C. C.	100 100 100 100 100 100 100 100 100 100	

If a question has previously been used in a saved form definition, it cannot be amended. For more information, see the sections on <u>Defining New SEND Portal Question Definitions</u> starting on page 31.

7. When you have finished creating the new form definition, click the **Save** button.

## **Searching for SEND Portal Question Definitions**

The **Question Definitions** are the **Question Codes** and the **Descriptions** that are used when creating form definitions for a SEND Portal Form Definition. For more information, see <u>Creating</u> <u>a New SEND Portal Form Definition</u> on page 28.

To search for SEND Portal Question Definitions:

1. Select Tools | Administration | Form Builder | SEND Portal Forms | SEND Portal Question Definitions to display the SEND Portal Question Definition Enquiry page.

E SEND Porta	Question Definition Enquiry	×
🐴 Search 🖹	Collapse 👻	
Question Info	rmation	
Question Cod	e	
Description	Dpen In New Window	
Question Code		
	Description	

- 2. If known, enter a full or partial Question Code or Description.
- 3. Click the **Search** button to return all questions based on the selection criteria. Alternatively, clicking the **Search** button without a code or description returns a list of all questions.

<u>New</u> SEND Portal Questions Definitions are created in the v4 Client via **Tools | Administration | Form Builder | SEND Portal Forms | SEND Portal Form Definitions**.

### **Viewing SEND Portal Question Definitions**

To view SEND Portal Question Definitions:

- 1. Select Tools | Administration | Form Builder | SEND Portal Forms | SEND Portal Question Definitions to display the SEND Portal Question Definition Enquiry page.
- Select a Question Definition and click the Open In New Window button to display the SEND Portal Question Definition [<Question Code>] page.

	SEND Portal Question	n Definition []				×
	💾 Save					
ę	🗿 😥 Question Inform	ation Question Restrictions		Question Information -		1
	Question Information					Â
	Question Code					
	Description				-	
					2	
	Data Type		*			
	Memo	×				
	Question Restrictions				5	H
	Answer Maximum Length		Answer is spell checked 🗙			
	Answer is Mandatory	×	Answer appears on the 🗙 Chronology			
	Answer is constrained	×	Answer can be X inherited multiple times			
	Constraint list (Please write each entry on new line.)					

It is not possible to make any changes to the question definition if it has been used and saved on a previous form.

3. If any changes have been made, click the **Save** button.

#### **Defining New SEND Portal Question Definitions**

New SEND Portal Questions Definitions are created in the v4 Client via **Tools | Administration | Form Builder | SEND Portal Forms | SEND Portal Form Definitions**. A new form definition can be created containing new questions, or an existing form definition can have new questions inserted.

The **SEND Portal Form Definition | Form Questions** panel enables you to define the questions to be used in the form definitions. Existing questions can be used or new questions can be added to the bank of questions to be used in the form definition. Existing questions can only be edited if the question has <u>not</u> been used in a previous form definition.

The **SEND Portal Form Definition | Form Questions | Question Selector** panel is the foundation of the form definition. It is a two pane panel which is either:

pre-populated in the left pane for an <u>existing</u> form.

2. Form Questions			
Question Selector			
🕀 Down 👚 Up 💊 Actions 🗸	🔊 Actions 🗸		
	Question Code	Description	^
			E

blank for a <u>new</u> form.

2. Form Questions Question Selector			
	🖌 Actions 🗸		
	Question Code	Description	^
			E
		Los allon	
	-	851	

The right pane (ie. the question bank) lists all available questions, where you can define additional questions. The question bank also contains EHCP questions of the same data type used in the SEND Portal.

To create additional questions:

- Create a new or open an existing SEND Portal Form Definition. For more information, see <u>Searching for a SEND Portal Form Definition</u> on page 27 and <u>Creating a New SEND Portal</u> <u>Form Definition</u> on page 28.
- 2. On the Form Questions | Question Selector panel, click the Actions button and select Create New Question to display the SEND Portal Question Definition dialog.

_						
	<u> Actions</u>					
	📄 Create Ne	ew Question				
	🕤 🛛 Add Ques	stion To Form				
	🔊 🛛 😽 😽	stion To New Group	On Form			
-	SEND Portal Question	n Definition []				X
	💾 Save					
	🔇 🕥 Question Inform	ation Question Restrictions			Question Information	• 1
	Question Information					
	Question Code					
	Description					וור
						=
					-	
	Data Type	Text		-		
	Memo	×				Л
	Question Restrictions					51
	Answer Maximum Length		Answer is spell chec	ked 🗙		
	Answer is Mandatory	×	Answer appears on t Chronology	he 🗙		
	Answer is constrained	×	Answer can be inherited multiple tin	×		
	Constraint list (Please write each entry on new line.)				-	
I	·				0000	

3. Enter a **Question Code** suitable for your purposes. You <u>cannot</u> start codes with the letter Z, as these are used elsewhere in One.

**Note:** When entering a **Question Code**, <u>do not paste</u> any values in to this field. This can leave a carriage return in this field, which can cause unwanted results when using forms that have these questions on.

- 4. Enter a **Description** suitable for your purposes.
- 5. Select a **Data Type** from the drop-down list. The data type controls how the question is displayed on the portal screen:

Question Data Type	Answer Description/Example
Text	Inserts a text box. Use with Answer Maximum Length field.
Integer Number	Only accepts whole numbers. Please see Important Note below.
Decimal Number	Only accepts decimal numbers.
Yes/No	Inserts a tri-state checkbox, i.e. tick, cross, blank.
Date	Only accepts a numerical date in dd/mm/yyyy format.
Image	Upload an image in .jpg, .jpeg, .gif, .bmp, .png format.

**Important Note:** It is advisable <u>not</u> to use the Integer Number Data Type to capture phone numbers, as a leading zero (0) at the start of the phone number is omitted. If you would like to capture phone numbers, it is advised you use the **Text Data Type**.

6. **Memo**. Tick the check box to create a Memo. The Memo field enables you to perform many common text editing and formatting functions. It also provides a spell-checker.

Note: The formatting and spell checker only work when the form is displayed in the v4 Client.

- 7. In the **Questions Restrictions** panel, enter the following fields:
- Answer Maximum Length: Define a maximum character length of the answer, which includes all characters and spaces.
- Answer is Spell Checked: Tick the check box if you want the text in a Data Type: Text box to be spell checked.
- Answer is Mandatory: Tick if the answer is mandatory. You cannot save a form until all mandatory fields have been completed.
- Answer appears in the Chronology: Tick if you want the answer to appear in the Chronology panel of the student.
- Answer is Constrained: Select the check box to create a Constraint List. An answer is constrained when One only allows the answer in a specific format, e.g. a date in dd/mm/yyyy format, Yes or No, an integer, or if there are defined constraints where you can only choose from a drop-down list of items.
- Constraint list: If the answer is constrained, the Constraint List box allows you to enter items that will be displayed as a drop-down list. Enter such items as a list separated by the return key, for example,
  - Apple¶ Pear¶ Orange¶ Banana¶
- Answer can be inherited multiple times. Occasionally an answer may be required from more than one person, for example, a Health Advice form may be required from two health professionals. Selecting this check box enables multiple questions/answers with the same Question Code to be selected for inclusion in the Chronology.

**Note:** It is advised that this is only used where it is necessary to inherit multiple answers as it required additional steps (choosing the questions) each time you create a form. It is also advised that this is not used with the 'repeating groups' functionality to avoid complications of data later down the line.

8. Click the **Save** button to save the question to the question bank list on the right side of the panel.

Repeat steps 1 - 7 until you have defined all the SEND Portal questions you want to add to the list.

## **Creating and Populating SEND Portal Question Groups**

After creating questions and adding them to the questions bank, they must be added to question groups. Each question group relates to one page on the portal.

The following procedure shows how to create question groups to which you add those questions.

Continuing from the previous steps (above) in the **SEND Portal Question Definition** dialog:

1. In the **Form Questions** panel, select a question defined above.

2. Click the Actions button and then select Add Question to New Group On Form to display the New Group dialog.

5	Actions -				
	Create New	Question			
	Add Questio	n To Form			
	Add Questio	n To New Group On Form			
			14		X
	New Group [New Gro	up]			
<b>B</b>	Save				
<	Question Group		Question	Group	- /
Q	uestion Group				
Da	ata Group Name	New Group			
	ata Group Guidance otes				
Nı	umber on Form	Does t	he group repe	at 🗙	

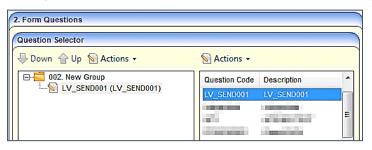
3. Enter the **Data Group Name**. This name represents the heading of the panel for that group of questions on the SEND Portal form.

**Note:** The **Data Group Name** can contain up to 300 characters, but care should be taken that the heading will fit to the screen.

 If required, enter the Data Group Guidance Notes. Data group guidance notes are displayed on the portal. The notes are also included on the printed SEND Portal form. See <u>Printing SEND</u> <u>Forms</u> on page 42.

**Note:** When printing a form, if you choose **Print with Guidance Notes**, One produces the form with guidance notes displayed. Guidance notes are in italics and display above the details of the panel.

- 5. Enter the **Number on Form**. Each question group is shown as a separate panel when the form is generated. You must number each panel in the order you want them to display on the form, starting from **2**. (One SEND automatically inserts the **Subjects** panel as number **01**.)
- 6. If required, select the **Does the group repeat** check box to replicate a group of questions. An **Add More** button is added to the toolbar of a SEND Portal form once you have entered data in the first repeating panel. Use repeating groups, for example, if you have a question group called Contacts that requires many names to be added.
- 7. Click the **Save** button to add the question to the new question group. The new question group is displayed on the left-side pane on the **Form Questions** | Question Selector panel.



Repeat steps 1 to 7 to add additional question groups.

After adding the required question groups, you can assign additional questions to the new groups by:

using 'drag and drop' to copy a question from the question bank on the right-side pane to the question groups on the left-side panel.

Form Questions Question Selector		
🐺 Down   Up 💊 Actions 🗸	🔊 Actions 🗸	
E- 2002. Heading 1	Question Code	Description
	1 20 2003	
	E00020	A Photograph
A number question (A300002)	200020	Arriologitaph

Note: Position the arrow 🗟 where you wish to 'drop' the question.

highlighting the question group, highlighting the question, clicking the Actions button and selecting Add Question to Form or Add Question to New Group on Form.

2. Form Questions	
Down   Up   Actions -     Down   D02 Heading 1     D02 Heading 1     D02 KEND001 (LV_SEND001)	Actions  Create New Question
UV_SENDOU (LV_SENDOU2) 003. Heading 2 SENDOU1_001 (SENDOU1_001)	Add Question To Form Add Question To New Group On Form
A number question (AJ00002)	E00020 A Photograph

You can only use a question once on a form. If the same question is used on a different SEND Portal form at a later date, the answer will be pre-populated.

For example, if you have a question called 'Social Care Status' used on form A, then you re-use that question on form B for the same child, form B is pre-populated with the answer from form A.

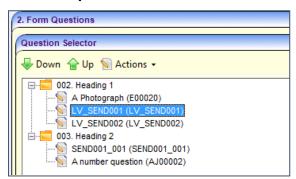
8. When you have finished, click the **Save** button.

## **Moving SEND Questions and Question Groups**

Individual questions can be moved up or down in the question order. However, a question group <u>cannot</u> be moved. If you wish to change the position of a question group, you must change the **Number on Form**. This means that <u>all</u> subsequent numbers will need to be changed. For more information, see <u>Editing SEND Questions and Question Groups</u> on page 36.

To move a question:

- 1. On the Form Questions | Question Selector highlight the question in the left pane.
- 2. Click the Up or Down arrow.



If you wish to move the question to another group, use the 'drag and drop' functionality.

3. Click the Save button.

## **Editing SEND Questions and Question Groups**

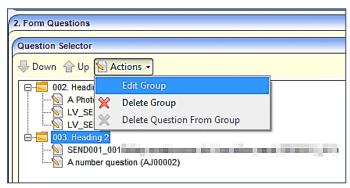
Questions can be edited, if they are not used on any previous forms. If the question has been used on a previous form, it cannot be changed. You can, however, select the **Answer can be inherited multiple times** check box, so future version of this question can record multiple answers.

To edit a question:

- 1. On the **Form Questions | Question Selector** double-click the question to display the **SEND Portal Question Definition** dialog; you can edit the question from either pane.
- 2. Make the required changes. The **Question Code** <u>cannot</u> be changed.
- 3. Click the Save button.

To edit a question group:

- 1. On the Form Questions | Question Selector highlight a question group on the left pane.
- 2. Click the Actions button and select Edit Group.



3. Make the required changes to the **Question Group** dialog. If you change the **Number on Form**, the following message displays:

Do you want all groups to be renumbered? This operation will remove any conflicts and gaps. But it may affect related quick reports too. It may also affect panels which currently have the same number assigned, changing them to an incorrect order.

Please double check the group numbers after this operation, if you answer 'Yes'.

- 4. If prompted, select **Yes** to reorder the groups or **No** to continue with the changes but to not renumber the groups.
- 5. Click the **Save** button.
- 6. If you said yes to automatic renumbering, check the numbering order is correct.

## **Deleting SEND Questions and Question Groups**

To delete a question:

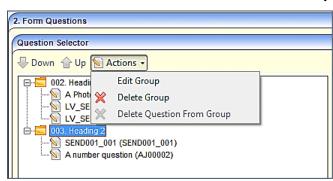
- 1. On the Form Questions | Question Selector, highlight a question on the left pane.
- 2. Click the Actions button and select Delete Question From Group.

2. Form Questions	
Question Selector	
Down 🔐 Up 💽 Actions -	
Image: Output display="block-state-st	
003. Heading 2     SEND001_001 (SEND001_001)     A number question (AJ00002)	

3. Click the Save button.

To delete a question group:

- 1. On the Form Questions | Question Selector, highlight a question group on the left pane.
- 2. Click the Actions button and select Delete Group.



3. Click the Save button.

**Important Note:** There is no message to confirm that you wish to delete the group! The group and all questions are deleted immediately. If a group is deleted in error, close the page without saving.

## **Deleting SEND Portal Question Definitions**

To delete a SEND Portal Question Definition:

- 1. Select Tools | Administration | Form Builder | SEND Portal Forms | SEND Portal Question Definitions to display the SEND Portal Question Definition Enquiry page.
- 2. Select a question definition and click the **Delete** button.

The following message is displayed:

Are you sure you want to delete this question?

3. Select **Yes** to delete the question definition. A message at the bottom of the screen informs you that the question has been deleted successfully.

You cannot delete a question that has been used in a previous saved form.

## **SEND Portal Management**

The **SEND Portal Management** page is accessed in the v4 Client via **Focus | Services | SEND Portal Management**. It enables online forms that have been submitted via the Professional Portal to be reviewed by the local authority teams. Partially completed forms are not displayed on the **SEND Portal Management** page; only submitted forms.

**Note:** ACL's set at the Form Definition level are not applied in the SEND Portal Management area. This is so that incoming information is not missed. These ACL's are applied if the form is approved to appear on a Student's Chronology in One v4 client.

When a Special Educational Needs and Disabilities (SEND) form is submitted via the Professional Portal, any child who has not been successfully matched to a student in One, or who has been successfully matched but for who there are differences (conflicts) between some details of the incoming child and the matched student, is processed via v4 Online | Portal Back Office | Data Transfer. The incoming students are listed under the SEND Dummy Base.

#### More Information:

*Matching Students via One Portal Back Office* handbook available from the **One Publications** website via **Handbooks | One Self Service**.

## **Searching For SEND Forms**

To search for a Special Educational Needs and Disabilities (SEND) form:

1. Select **One v4 Client | Focus | Services | SEND Portal Management** to display the **Search Forms** page. The list of forms display in the browse below the filter panel.

The list can be ordered by selecting any of the headings:

- Form Name
- Form Submitter Name
- Child or Young Person Name
- Child or Young Person DoB
- Form Received Date
- Form Reference Number
- Status.
- 2. Select a filter; you can search using **Type of Form**, **Start Date** or **End Date**.
- 3. Click the **Search** button to display the forms according to the search filters.

## **Reviewing SEND Forms**

Before you can action a form, it must have been processed via v4 Online | Portal Back Office | Data Transfer.

To review a Special Educational Needs and Disabilities form:

- 1. Select **One v4 Client | Focus | Services | SEND Portal Management** to display the browse list.
- 2. Use the search filters to reduce the number of visible forms.
- 3. Select a record to display the Form Details page.

Form Details	
Form Name	1040-01
Child or Young Person Name	COURSE AND COURSE IN
Form Received Date	
Form Submitter	LINES B. CONSI ST. S.
Professional Role	
Organisation Name	194
Professional Address	NO BORNER RUNS LOUIS AND ADD ADD
Mobile Number	C
Work Phone	
Form Reference	SND-
Status	Opened

The form can be approved, rejected or more information can be requested. A form can also be returned to B2B.

For more information, see the following sections:

- Approving SEND Forms
- Rejecting SEND Forms
- Requesting More Information for SEND Forms
- Resubmitting SEND Forms to B2B.

## **Approving SEND Forms**

A Special Educational Needs and Disabilities form is approved in the v4 Client via Focus | Services | SEND Portal Management.

- 1. Select a form to display the Form Details page.
- 2. Click the Accept button to display the Process and Send Message page.
- 3. If required, make changes to the default message.
- 4. Click the **Approve and Send Message** button to inform the applicant that their form submission has been reviewed and is being processed accordingly.

A confirmation message is displayed containing the following information:

Form approved. The Form Submitter has been notified.

Form Name. Special Educational Needs & Disabilities - <Assessment Form>.

Form Reference. SND-<1505-1234ABCD>.

## **Rejecting SEND Forms**

A Special Educational Needs and Disabilities form is rejected in the v4 Client via **Focus** | **Services** | **SEND Portal Management**.

- 1. Select a form to display the Form Details page.
- 2. Click the **Reject** button to display the **Process and Send Message** page.
- 3. If required, make changes to the default message.
- 4. Click the **Reject and Send Message** button to inform the applicant that it has been decided no further action will be taken.

A confirmation message is displayed containing the following information:

Form rejected. The Form Submitter has been notified.

Form Name. Special Educational Needs & Disabilities - < Assessment Form>.

Form Reference. SND-<1505-1234ABCD>.

## **Requesting More Information for SEND Forms**

Additional information regarding the form can be requested in the v4 Client via **Focus** | **Services** | **SEND Portal Management**.

- 1. Select a form to display the Form Details page.
- 2. Click the **Request More Information and Send Message** button to display the **Process and Send Message** page.
- 3. If required, make the changes to the default message.
- 4. Click the **Request More Information** button to request more information.

A confirmation message is displayed containing the following information:

The Form Submitter has been notified.

Form Name. Special Educational Needs & Disabilities - < Assessment Form>.

Form Reference. SND-<1505-1234ABCD>.

## **Resubmitting SEND Forms**

Sometimes a child or young person will not be matched in B2B and therefore their form will need to be resubmitted to B2B.

The form can be resubmitted in the v4 Client via Focus | SEND Portal Management.

- 1. Select a form to display the Form Details page.
- 2. Click the Request More Information button to display the Process and Send Message page.
- 3. If required, make the changes to the default message.
- 4. Click the Request More Information button to request more information.

A confirmation message is displayed containing the following information:

The Form Submitter has been notified.

Form Name. Special Educational Needs & Disabilities – *Assessment Form*>. Form Reference. SND-*1505-1234ABCD*>.

## **Student's Chronology**

**Note:** ACL's set at the Form Definition level are not applied in the SEND Portal Management area. This is so that incoming information is not missed. These ACL's are applied if the form is approved to appear on a Student's Chronology.

The SEND form is added to the student's chronology after the following processes have been completed:

- A verified professional user submits a SEND form on behalf of a child or young person to the local authority via the Professional Portal.
- If required, the child or young person is processed via B2B (Portal Back Office); they are matched to a One student and any conflicts are resolved.
- The SEND form is assessed by the SEND Administrator in the v4 Client via SEND Portal Management. An approval message is sent to the professional user's account.

The read-only SEND form can be viewed in the v4 Client via Focus | People | Students | Chronology.

	Drag a column here to group by this column.								
Date Updated By Event CRN Version Number Type Type					Status	Chronolog			
Equals: 💙	Contains: 🛛 🏹	Contains: V	Contains: 🍸	Contains: 🛛 🖓	Contains: 🏹	Contains: 🛛 🏹	cγ		
10/06/2015 08:55:11	Professional	SEND Professional Portal Form 001	ant databay na sa sa sa	1	SEND Portal	et et étéreses au au au au	S		
09/06/2015 10:21:29	Professional	SEND Professional Portal Form 001		1	SEND Portal		s		

Clicking on the **Date** link displays the SEND form details.

💾 Save 🔊 Save Offlin	eds & Disabilities - SEND == (version 1 == == == == == == == == == == == == =	× *
000. SEND Portal Fo	rm Summary	
Accepted By	SYSADMIN	
Accepted Date		
Submitted By	in (VP)	
Submitted Date		
Professional Role		
Organisation Name	1982 P	
Professional Address		E
Mobile Number		
Work Phone		
001. Subject Details		
002.		
003.		

Apart from the **Summary**, the content of the panels in the v4 Client are the same as the steps in the Professional Portal.

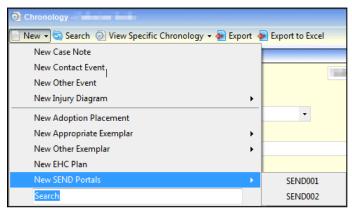
- Panel 000 is a summary of dates for the SEND form process. It also includes information from Step 1 Work Details.
- Panel 001 is <u>automatically</u> inserted as the Subject Details.
- Subsequent panels are represented by subsequent steps.
- The final step in the Professional Portal is <u>always</u> the **Summary**; this is not displayed in the v4 Client version.

## Creating New SEND Portal Forms From Student's Chronology

When an approved SEND Portal Form from the Professional Portal is added to the student's chronology, it is read-only. Occasionally a professional may wish to make changes to a form. This can be achieved by creating a new SEND Portals form in the chronology.

To create a new SEND Portal form:

- 1. Select v4 Client | Focus | People | Students | Chronology to display the student's chronology.
- 2. Click the **New** button at the top of the chronology, select **New SEND Portals**, then choose the required **SEND Portal Form Definition** from the list.



The displayed form is a duplicate of the form that was submitted on the Professional Portal, but the inherited answers can now be edited. Inherited answers have a green outline around them.

- 3. Make the required changes to the form.
- 4. Click the Save button.

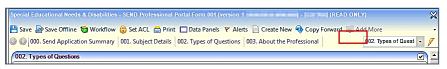
If some answers have not been changed, the following message is displayed:

Some pre-populated answers have not been changed. Are you sure you want to continue? Click OK to save, or Cancel to review the form again.

## **Printing SEND Forms**

You can output a SEND form as it is displayed on the screen either as a Word document or a PDF. The v4 Client does not print directly, instead, a Microsoft Word or PDF file is created by the v4 Client and then you can use Word or Acrobat Reader to send the document to your printer.

A check box on each panel header enables you to include only the panels you require in the printout.



To print a SEND form:

- 1. Open a SEND form on the student's chronology.
- 2. If required, select the check box on individual panels to display on the printout. The **Subject Details** are automatically included, but these can be removed before printing.

 Click the Print button to display the Print Window dialog. For more information about the print options, see the <u>SEND Print Options</u> topic.

Data Panels         Select All         Deselect All         Deselect All         Deselect All         Document Type         Constraints         Displect Details         Deselect All         Deselect Bookmark <tr< th=""><th>🖳 Print Window</th><th>×</th></tr<>	🖳 Print Window	×
	Data Panels         Select Al	Normal     Notes     Guidance     Guidance     Guidance     Add as Case Note     Attach     WORD     V     ORD     V     ORD     PDF     Create Bookmark     Delete Bookmark     Delete Bookmark     Delete Bookmark     Insert Page Breaks After Each Panel

4. Click **Print** to preview the document. When the document opens it has a number as the file name, click **Save As** to store the document to a local folder.

**Note:** The headings displayed on the printout are in numerical order and not the same as the panel numbers, so although you may have selected Panels 1, 2, 10 and 20 the printout shows 1, 2, 3 and 4.

- 5. Open the document you want to print.
- 6. Select the print option within the application, e.g. MS Word, to send the document to your printer. At any time you can **Cancel** the print process.

## **SEND Print Options**

#### **Data Panels**

Click on the plus signs to expand the tree to view the questions within a panel and select or deselect as required. If any one question is checked then the panel check box is also activated.

You can Select All or Deselect All panels

#### **Document Type**

Normal - The default, which prints the selected contents of the SEND form.

**Notes** - Prints a blank page after the contents of each selected panel have been printed; the blank page is entitled *Notes:* [Description of the Panel].

**Guidance** - prints guidance notes in italics which appear above the details of the panel. If guidance notes have <u>not</u> been entered on the Form Definition, this radio button is not available.

#### Case Note

Case notes are not required for SEND forms.

#### **Document Format**

You can print the document in MS Word or PDF format. The default is WORD.

## Bookmark

Bookmarks are not required for SEND forms.

## Page Break

Select the check box if you wish to insert a page break after each panel.

## Changing the Font Type and Size

You can change the format of the printouts in the *CCSGenericPrintSettings.ini* file, which is located in the same folder as the CCSEnterprise.exe. This .ini file enables you to edit the font type and font size for:

Panel Title

Sub-Title.

### Inserting a Logo

When a SEND form is printed, you can insert a logo on the plan.

Add a logo as a .jpg to a directory on your local workstation. Then open the *CCSGenericPrintSettings.ini* in the Capita Childrens Services System folder and enter the Logo Path section as follows:

-- Logo Path

LOGOPATH=D:\LOGO\print\_logo.JPG

## **Portal Sharing**

A key component of SEND enables users of the different portals to share information. The local authority can control which portal users involved with a child can see SEND information. This includes information that is coming into the local authority and also information going out to other organisations and parents.

The **Portal Sharing** functionality is available in the v4 Client via **Focus | People | Students | Student Details | Involvements | EHCP Assessment Involvement**.

The **Portal Sharing panel** enables you to record details of any portal users. You can also indicate whether that person has been authenticated to view forms and files uploaded via the Citizen or Professional Portal.

Portal Sharing									
Portal Name	Portal Email	Portal User Type	Role/Relationship	Young Person	Parental Responsibility	Authenticated	Authenticated By	Authentication Reason	Generation Add

To add a portal sharing user:

1. Click the Add button to display the Portal Sharing [New Portal User] dialog.

New Portal Sharing [New	Portal User]						
💞 Ok							
🕝 💿 1. Portal User De	1. Portal User Details 👻						
1. Portal User Details							
Portal User							
Portal Email							
Portal User Type							
Role/Relationship							
Young Person	X Parental Responsibility 🗸						
Authenticated	✓ Authentication Reason Memo						

2. Enter the required information:

Portal User – use the browse button to select the name of the portal user.

Portal Email – automatically populated when the user is selected.

**Portal User Type** – automatically populated when the user is selected. If a Professional portal user is selected, this information is automatically shared on the Professional portal.

**Role**/**Relationship** – enter a role or a relationship. If this is a professional role, then the field is automatically populated.

Young Person – select this check box if the portal user is a young person.

Parental Responsibility – select this check box if the portal user has parental responsibility.

Authenticated – selecting this check box displays the following message:

Are you sure you want to authenticate *(name)*? Authenticating this portal user means that they will be able to see SEND information relating to the subject on this involvement form.

Authentication Reason - this is added as a memo.

- 3. Click the **OK** button.
- 4. Click the Save button on the EHCP Assessment involvement form.

## **Recording Information Requested**

The **information Requested** panel is located on the student's **EHCP Assessment Involvement**. This panel enables you to record details of any information that has been requested. This includes details about the portal user who information has been requested from.

Information Rec	luested								
One Person Name	Portal Name	Portal Email Address	Role	Information Requested	Form Title	Information Due	Notified Date	Information Received Date	Add Edit Remove Notify

To add details about requested information:

1. Click the Add button to display the Information Requested [New Info Requested] dialog.

#### SEND Administration in v4 Client

Ok W UDF Manager Ok W UDF Manager I Information Re. I Information Requested Details Portal Name One Person Form Portal Email Address Role Information Requested	🔊 Information Requeste	d [New Info Requested]	
1. Information Requested Details         Portal Name         One Person         Form         Portal Email Address         Role	🔗 Ok 🙆 UDF Manager		
Portal Name One Person Form Portal Email Address Role	🕝 😳 1. Information Re	1. Information Reque 👻	
One Person       Form       Portal Email Address	1. Information Request	ed Details	
Form     •       Portal Email Address     •       Role     •	Portal Name		
Portal Email Address       Role	One Person	Q, X &	
Role	Form		•
	Portal Email Address		
Information Requested	Role		
	Information Requested		
	n		
Information Due Votified Date		▼ Notified Date ▼	
Date			

2. Enter the required information:

Portal Name – select the portal user.

**One Person** – select the person from the One database.

Form – select the form that was submitted via the Citizen portal.

Portal Email Address – automatically populated when the portal user is selected.

Role – enter the user's role.

Information Requested – enter the details of the requested information.

Information Due – select a date.

Notified Date - select a date.

Information Received Date – select a date.

- 3. Click the **OK** button.
- 4. Click the **Save** button on the EHCP Assessment involvement form.

## Alerts

Portal messages (alerts) are set up in the v4 Client via **Tools | Administration | Alert Definition**. They are used to keep parents, young people and professionals informed about SEND processes, e.g. if a person has been authenticated as a portal user or to request additional information. Only authenticated portal users on a child or young person's EHCP assessment involvement can receive portal messages.

Two types of alerts can be set up for portal messages:

- Trigger a portal message is sent when a specific action occurs (the trigger).
- Scheduled a portal message is sent at a pre-defined time.

## Setting up a Trigger Alert

A trigger alert is made up of the following elements:

- A definition
- A selection of fields
- A recipient
- An action.

#### **Alert Definition**

1. In the v4 Client, select **Tools | Administration | Alert Definition | New** to display the **Alert Definition [New Alert Definition]** page.

On the Alert Definition panel, the Alert Definition ID is a system generated number.

Γ	Alert Definition [New Alert	Definition]				×
	💾 Save 📄 New 🗔 Ac	tivate				
	🕢 诊 1. Alert Definition	2. Trigger Alert	3. SQL Alert	4. Scheduled Alert	1. Alert Definition	• 1
	1. Alert Definition					
	Alert Definition ID					
	Alert Type	Trigger	•			
	Reason for Alert					
	Description					
	Active	×		Predefine	d 🗙	

- 2. Select the Trigger Alert Type.
- 3. Enter a Reason for Alert.
- 4. Enter a **Description**.

Active is checked when the alert is activated, <u>after</u> it has been saved. The Activate button cannot be used to activate a new alert.

**Predefined** is a system generated field and cannot be edited.

#### **Field Selection**

1. On the **Trigger Alert** panel, select an **Alert Based On** context; either *Involvements – Portal Sharing* or *Involvements – Info Requested*.

The Database Trigger and the table name are automatically populated.

Aler	t Based On Involvements - P	ortal Sharing	✓ IN	IV_FORM_SEN_PORTAL_SHARING
Data	base Trigger TRG_ALERT_i			
Field	Selection SQL Retrospective Action	n		
<u>с</u> ,	Select All 🗙 De-Select All 🛕 The u	ise of the "" character s	tring is not permitted and is a	automatically removed
	Field	Alert When Changed	Only When Changed From	Only When Changed To
	INV FORM SEN PORTAL SHARING I	X		
	INVOLVEMENT ID	×		
	PUBLIC USER ID	×		
	PORTAL USER ROLE	×		
Þ	AUTHENTICATED	✓		
	MEMO ID	×		
	LAST UPDT	×		
	UPDATED BY	×		
	PARENTAL RESPONSIBILITY	×		
	AUTHENTICATED BY	×		
	IS YOUNG PERSON	×		

- 2. Select the **Field Selection** tab to display all of the fields according to the context selected in the **Alert Based On** drop-down list.
- 3. Select the **Alert When Changed** check boxes of the fields that, when changed, will trigger a portal message.
- 4. Click the Save button.

Once the alert has been created, you need to add a recipient.

#### **Recipients**

Alerts require at least one recipient. To add a recipient:

1. On the Alert Definition page, go to the Recipient List panel.



2. Click the Add Portal Users button to display the Portal User Enquiry dialog.

Rortal User Enquiry	the state a statementary for the statement	
🏦 Search [ Collapse 👻		
Portal User Search		
Forename		
Surname		
Email Address		
Send to portal type		
All EHCP Involved Citizen Portal Users	All EHCP Involved Professional Portal Users	
✓ Select		

- 3. If you wish to send the portal message to just one portal user, use the **Portal User Search** panel to locate the person. The results are displayed below the panels.
- 4. If you wish to send the portal message to <u>all</u> EHCP involved users, select the required check box on the **Send to portal type** panel.
- 5. Click the **Select** button to return to the **Recipient List** panel.

Selecting All EHCP involved Citizen Portal Users and/or All EHCP Professional Portal Users displays the following message:

The recipients of this alert will be authenticated *<Portal/Citizen Portal/Professional Portal>* users that are on a child or young person's EHCP Assessment Involvement.

Depending on your selection of users, the Recipient List panel displays as:

5. Re	cipient List							
	Туре	Name	Description	EmailAddress	Email	Popup	Workflow	Portal Message
•	Citizen	Reity Hoter	n/a	dealer for hidden for the state of the	×	×	×	1
	Citizen	n/a	All EHCP Involved Citizen Portal Users	n/a	×	×	×	~
	Professional	n/a	All EHCP Involved Professional Portal Users	n/a	×	×	×	~

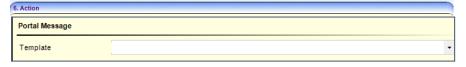
Recipients can be removed by highlighting the row and clicking the **Remove** button.

Before you can continue, an action (the way the alert is delivered) must be defined.

#### **Actions**

Alerts require an action to be defined. To define an action for a portal message alert:

1. On the Alert Definition page, go to the Action panel.



- 2. Select the Portal Message section.
- 3. Select a **Template** from the drop-down.
- 4. Click the **Save** button. The following message is displayed:
- 5. Do you want to activate the alert?
- 6. Click the **Yes** button; this activates the alert immediately and the **Activate** button at the top of the page changes to **Deactivate**.

	~
I Save New 🚱 Deactivate 💥 Delete	
	_
💿 💿 1. Alert Definition 2. Trigger Alert 3. SQL Alert 4. Scheduled Alert 5. Recipient List 6. Action 7. View Trigger SQL 1. Alert Definition 🗸	1

#### More Information:

*RG\_Administration\_Creating Trigger Alerts* available from the **One Publications** website via **Reference Guides | Administration**.

## Setting up a Scheduled Alert

Scheduled alerts are created so that a message can be sent on a specific date.

The scheduled alert functionality is linked to the configuration tool which determines the frequency of checking for background tasks, e.g. the job scheduler. For more information, refer to the *v4 Scheduled Tasks* technical guide, available on the **One Publications** website.

A scheduled alert is made up of the following elements:

- A definition
- An SQL query
- A recipient
- An action.

#### **Alert Definition**

1. In the v4 Client, select **Tools | Administration | Alert Definition | New** to display the **Alert Definition [New Alert Definition]** page.

On the Alert Definition panel, the Alert Definition ID is a system generated number.

Alert Definition [New Alert I	Definition]	×
💾 Save 📄 New 🧔 Act	ivate	
I. Alert Definition	2. Trigger Alert 3. SQL Alert 4. Scheduled Alert 1. Alert Definition	• 1
1. Alert Definition		
Alert Definition ID	and the state was placed in the state of a	E
Alert Type	Scheduled -	
Reason for Alert		
Description		
Active	× Predefined ×	

- 2. Select the Scheduled Alert Type.
- 3. Enter a Reason for Alert.
- 4. Enter a **Description**.

Active will be checked when the alert is activated, <u>after</u> it has been saved. The Activate button cannot be used to activate a new alert.

Predefined is a system generated field and cannot be edited.

#### **SQL Query**

1. On the **Scheduled Alert** panel, enter the SQL **Query**. You can only use *Select* statements and you cannot include parameters in the SQL **Query** field.

4. Scheduled Alert				
Query				*
Include SQL Result	x		Fire Alert if row returned	V
Alert next scheduled	-			
Repeat every	1 Day(s)	T		

- 2. If required, select the **Include SQL Result** check box to enable repetition of the SQL message in the output.
- 3. If you want to fire a message regardless of the values returned, select the **Fire Alert if Row Returned** check box.
- 4. Enter the date and time for Alert next scheduled.
- 5. Enter a number to **Repeat every** Minute(s), Hour(s), Day(s), Week(s) or Month(s).
- 6. Click the Save button.

Once the alert has been created, you need to add a recipient.

#### **Recipients**

Alerts require at least one recipient. To add a recipient:

1. On the Alert Definition page, go to the Recipient List panel.



2. Click the Add Portal Users button to display the Portal User Enquiry dialog.

Dortal User Enquiry	p dagt i 100 maa it kalaan ay aya kalaan ay ah kalaan iyo kalaan ay ah
👫 Search [ 🔁 Collapse	•
Portal User Search	
Forename	
Surname	
Email Address	
Send to portal type	
All EHCP Involved Citizen Portal Users	All EHCP Involved Professional Portal Users
I Select	

- 3. If you wish to send the portal message to just one portal user, use the **Portal User Search** panel to locate the person. The results are displayed below the panels.
- 4. If you wish to send the portal message to <u>all</u> EHCP involved users, select the required check box on the **Send to portal type** panel.
- 5. Click the Select button to return to the Recipient List panel.

Selecting All EHCP involved Citizen Portal Users and/or All EHCP Professional Portal Users displays the following message:

The recipients of this alert will be authenticated *<Portal/Citizen Portal/Professional Portal>* users that are on a child or young person's EHCP Assessment Involvement.

Depending on your selection of users, the **Recipient List** panel displays as:



Recipients can be removed by highlighting the row and clicking the **Remove** button.

Before you can continue, an action (the way the alert is delivered) must be defined.

#### Actions

Alerts require an action to be defined. To define an action for a portal message alert:

1. On the Alert Definition page, go to the Action panel.

6. Action			
Portal Message			
Template	•		

- 2. Select the **Portal Message** section.
- 3. Select a **Template** from the drop-down.
- 4. Click the Save button. The following message is displayed:

Do you want to activate the alert?

5. Click the **Yes** button; this activates the alert immediately and the **Activate** button at the top of the page changes to **Deactivate**.



#### More Information:

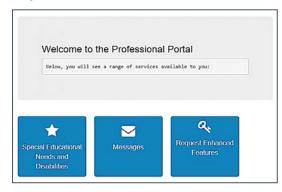
*RG\_Administration\_Creating Scheduled Alerts* available from the **One Publications** website via **Reference Guides | Administration**.

## **06** Professional Portal Users

## **Professional Portal Users Introduction**

This following section of the handbook explains how the Professional Portal user performs the following processes:

- Manage their account. For more information, see <u>Managing My Account</u> on page 53.
- Add a child or young person that they work with to the professional portal. For more information, see <u>Adding a Person</u> on page 61.
- Complete SEND forms and submit them to the Local Authority in a secure manner. For more information, see <u>Completing and Submitting a Professional Portal SEND Form</u> on page 59.
- The ability to view the progress of submitted SEND forms, including historical forms. For more information, see <u>Completing and Submitting a Professional Portal SEND Form</u> on page 59.
- View any messages received from the local authority. For more information, see <u>Messages</u> on page 62.



## **Two Step Verification**

Two step verification is an additional process to increase your security when logging onto the Professional Portal. This process is mandatory if you wish to use Special Educational Needs and Disabilities.

The process is available via **My Account | Two Step Verification**. For more information, see <u>*Two Step Verification*</u> on page 56.

## **Managing My Account**

A Professional Portal user can manage the following details by clicking the **My Account** link on the top of the **Home** page:

- Personal Details
- Work Details
- Change Email Address
- Change Password
- Change Secret Question
- Change of Circumstances
- Two Step Verification.

## **Personal Details**

To add your personal details:

- 1. In v4 Online, select Professional Portal | My Account | Personal Details.
- 2. Enter information into the fields displayed in the following graphic. Click in a field to display the relevant tooltip.

Pers	onal Details	
Title		
*		$\checkmark$
Foren	ame	
2		
Surna	me	
2		
Gende	er	
4		
Sav	e	

3. Click the Save button.

## **Work Details**

To add your work details:

- 1. In v4 Online, select Professional Portal | My Account | Work Details | Add Work Details.
- 2. Enter information into the fields displayed in the following graphic. Click in a field to display the relevant tooltip.

	ust enter your Work Details before you can an application.
Work	Details
Profes	ssional Role *
	caseworker
Organ	isation Name *
*	
Postc	
Find	Address Enter Address Manually
Mobil	e Number
۵	
Work	Phone
٩	
Sav	2

3. Click the Save button.

## **Change Email Address**

To change your email address:

- 1. In v4 Online, select Professional Portal | My Account | Change Email Address.
- 2. A warning message is displayed for you to check that the new email address is entered correctly. Click the **Next** button.
- 3. Enter information into the fields displayed in the following graphic. Click in a field to display the relevant tooltip.

Change Email Address	
New Email Address *	
	J
Confirm New Email *	
2	J
Password *	
Q.	
Submit	

4. Click the Submit button.

## **Change Password**

To change your password:

- 1. In v4 Online, select Professional Portal | My Account | Change Password.
- 2. Enter information into the fields displayed in the following graphic. Click in a field to display the relevant tooltip.

Change	assword	
Current Pa	ssword *	
۹.		J
New Pass	rord *	
Q.		]
Confirm P	ssword *	
Q.		J
Submit		

3. Click the **Submit** button.

## **Change Secret Question**

To change your secret question and secret answer:

- 1. In v4 Online, select Professional Portal | My Account | Change Secret Question.
- 2. Enter information into the fields displayed in the following graphic. Click in a field to display the relevant tooltip.

#### Professional Portal Users

Change Secret Question/Answer					
Secret	Question *				
Secret	Answer *				
<b>P</b>					
Confir	m Password *				
a,					
Sub	mit				

3. Click the **Submit** button to save the changes.

## **Change of Circumstances**

If you need to record a change to your circumstances, you must contact your local authority.

## **Two Step Verification**

Two step verification is an additional process to increase your security when logging onto the Professional Portal. This process is mandatory if you wish to use Special Educational Needs and Disabilities (SEND).

## **Enabling Two Step Verification**

The <u>first time</u> you log onto the Professional Portal you are given the option to enable the two step verification process. If you try to log onto SEND without enabling the two step verification process, the following message is displayed:

This area requires Two Step Verification to be enabled before you can access it. Please enable this in My Account before continuing.

To set up two step verification:

- 1. Log onto the Professional Portal using the email address and password you used to register.
- Click the Login button to display the Enable Two Step Verification now dialog. This dialog is only available for a few seconds. If it disappears, the two step verification process can be enabled via My Account | Two Step Verification.



3. Click the Enable now link to display the My Account | Two Step Verification page.

/ly Account	Two Step Verification			
Personal Details				
Contact Details	Two Step Verification is our way to make your data more secure.			
	If you enable Two Step Verification, we will send you a Verification Code every time you sign in. This helps us keep your data saf			
Change Email Address	Some areas require Two Step Verification to be enabled before you can use them. We will tell you when you try to access if you do not already have Two Step Verification enabled.			
Change Password	Changing your preference will sign you out, and you will need to sign in again.			
Change Secret Question	Preferred method			
Change of Circumstances	● Email			
Two Step Verification				
	Save			

- 4. To receive a verification code to your registered email address, select **Email** from the **Preferred method** drop-down.
- 5. Click the Save button.

You will be signed out and will need to sign in again.

6. Log in; this time when you log in, the following dialog is displayed:

'our Verificati	on Code has been sent.
lease enter y	our Verification Code to continue.
Your Verifica	ation Code *
<b>•</b>	

- 7. Locate the email containing your verification code.
- 8. Copy and paste your verification code into the box.
- 9. Click the Verify button.

If you enter an incorrect verification code, the following warning is displayed:

The Verification Code you entered is invalid. Please try again. Codes expire after 5 minutes and are 6 numbers long. If you make 4 incorrect attempts, your account will be locked for 4 minutes before you can sign in again.

#### **Disabling Two Step Verification**

The two step verification process is mandatory for users of Special Educational Needs & Disabilities (SEND) and therefore cannot be disabled. If you try to access the SEND module, the following message is displayed:

This area requires Two Step Verification to be enabled before you can access it. Please enable this in My Account before continuing.

To disable Two Step Verification:

1. Select My Account | Two Step Verification to display the Two Step Verification page.

My Account	Two Step Verification					
Personal Details						
Contact Details	Two Step Verification is our way to make your data more secure.					
	If you enable Two Step Verification, we will send you a Verification Code every time you sign in. This helps us keep your data safe.					
Change Email Address	Some areas require Two Step Verification to be enabled before you can use them. We will tell you when you try to access if you do					
Change Password not already have Two Step Verification enabled.						
Change Secret Question	Changing your preference will sign you out, and you will need to sign in again.					
change occret question	Preferred method					
Change of Circumstances	No Two Step Verification ✓					
Two Step Verification						
	Save					

- 2. Select No Two Step Verification from the Preferred method drop-down.
- 3. Click the **Save** button.

You will be signed out and will need to sign in again.

## **Authenticated to Share Information**

When a professional user is flagged as being able to share SEND information and view shared files, the following alert message is sent to the **Messages** tile:

Authenticated to view Special Educational Needs & Disabilities information.

Select the message to view the complete message.



More Information:

Messages on page 62.

## **Special Educational Needs and Disabilities Tile**

The **Professional Portal | Home | Special Educational Needs and Disabilities** tile enables the professional user to submit SEND forms for the children and young people that they work with to the local authority in a secure manner.

When a professional user accesses their SEND home page on the Professional Portal, they can see, in addition to those children and young people for whom they have previously submitted forms, those children and young people against whom they are recorded as having an active professional involvement.

If a child or young person that they are working with is not listed, clicking the **Add Person** button enables them to add another child or young person to their account. For more information, see <u>Adding a Person</u> on page 61.

## Completing and Submitting a Professional Portal SEND Form

All of the following screens can be edited by the local authority via **One v4 Online | Citizen Portal Admin | Home | Administration | General Administration | Edit Resources | Resource Configuration Title | Text Resources | SEND**. For more information, see the *Edit Resources* section in the *General Administration* chapter.

To complete a Professional Portal SEND form, the professional user completes the following procedure:

 Select Professional Portal | Home | Special Educational Needs and Disabilities to display the Select Person page. A list of children and young people associated with the professional is displayed.

★ Special Educational Needs and Disabilities						
Select Person						
The children and young people for whom you have previously submitted forms are listed below. Selecting a name from the list will show a history of forms you have submitted for that person and a list of forms you may now wish to submit.						
Person Filter Add Person						
Name \$	Date of Birth 🗢	Address 🗢	School \$			
Normal Address	200 BL/200 P	Distriction from America Society, Service 307				
The second	0.000	In the second based, the second states, then the				
Back						

2. Select a child or young person from the list to display the Edit Person page.

★ Special Educational Needs and Disabilities						
Edit Person						
Please confirm the details below before proceeding. Fields marked with * are mandatory.						
Forename *	4	and the				
Middle Name	4					
Surname *	4					
Gender *	4	T				
Date of Birth *		P1.08.033.088				
Current School		net tautettaan dagaarkaa territe				
Ethnicity *						
First Language *		ini na kina na ini ini ina i				
House Number	*					

- 3. Check the details. If necessary, make any changes.
- 4. Click the **Continue** button to display the **Forms** page.

* Special Educational Needs and Disabilities	
Forms	
This page shows the forms that are available for you submitted.	to fill in and a history of forms that are in progress, or which you have previously
Forms	History
Please select the appropriate form you would like to complete.	Below is a list of forms you have started or submitted in the past for many more and
Special Educational Needs & Disabilities - SEND Professional Portal Form 001	Start Special Educational Needs & Disabilities - SEND Continue Professional Form 00/06/2015
Special Educational Needs & Disabilities - The SEND Professional Form	Start

The **Forms** page is divided into the following sections:

- **Forms** displays all forms that are available to you according to your role and permissions.
- History displays forms that you have started and forms that you have completed and submitted to the local authority.
- 5. Select a form and click the **Start** button to display the **Work Details** page.

Work Details
Jinin .
Organisation Name
Address
Work Phone
Mobile Number
Select

The following information is displayed at the top of the page:

Please select the Professional Role you would like to complete this form as.

If you would like to complete this form as a different Professional Role that you have not yet added to your Professional Portal account, then please navigate to My Account and select Work Details to add a new Professional Role.

If your Organisation Name, Work Address or contact details have changed for your Professional Role, then please navigate to My Account and select Work Details to update these details.

6. Click the **Select** button to display **Step 2** of the form; (Step 1 was Work Details).

Step 1 Work Details	→Step 2 Group1	Step 3 Group2	▶ Step 4 Group3	▶Step 5 Group4	Summary
		Construction of the second second second	-	Non-section to be an entropy of	A RECEIVED IN THE RECEIVED AND AND AND AND AND AND AND AND AND AN

The final step is always the **Summary**. For more information see <u>Using the SEND Form Builder</u> on page 27.

- 7. Complete all steps; click the **Save & Continue** button at the end of each step.
- 8. On the **Summary** page, select the check box to confirm that you have read and agree to the declaration.
- 9. Click the **Accept** button to display the **Form Submitted** page. This page informs you that the form has been submitted to the local authority.

Partially completed forms are not displayed on the **SEND Portal Management** page; only submitted forms.

 Click the Finish button to return to the SEND Home | Forms page. The form is displayed in the History with a date and the status of the form – orange for In Progress and green for Submitted.

Special Educational Needs and Disabilities	
Forms	
This page shows the forms that are available for you to submitted.	fill in and a history of forms that are in progress, or which you have previously
OTTHS ease select the appropriate form you would like to complete.	History Below is a list of forms you have started or submitted in the past for Lin Vee
Special Educational Needs & Disabilities - SEND Professional Portal Form 001	Start Special Educational Needs & Disabilities - SEND Continue Professional Portal Form 000 (2004/2013)

- 11. If required, click the View Details button to see the Form Summary details.
- 12. Click the **Continue** button to finish a form and submit it to the local authority.

For more information on the process the local authority performs next, see <u>SEND Portal</u> <u>Management</u> on page 38.

**Note:** A partially completed form can be updated on the Professional Portal by the user. Once a form has been submitted and approved, it can only be updated by the local authority on the Chronology.

## **Adding a Person**

If the child or young person is not listed in the **Select Person** browse, they must be added to the professional user's account.

To add a child or young person, the professional user completes the following procedure:

1. Select **Professional Portal | Home | Special Educational Needs and Disabilities** to display the **Select Person** page.

Select Person			
		u have previously submitted forms are listed below. Select for that person and a list of forms you may now wish to su	
			(
Name 0	Date of Birth ©	Address ©	School ©
New York, Street,	2007/002	Electricities for destroy for the series of the	
THE R.	10.041004	In the second test the second states and the	

2. Click the Add Person button to display the Add Person page.

★ Special Educational Needs and	I Dis	abilities
Add Person		
Please enter child details before	pro	ceeding. Fields marked with * are mandatory.
Forename -	۵	
Middle Name	۵	
Surname -	۵	
Gender -	۵	Please select a gender
Date of Birth -		
Current School		Please Select Current School
Ethnicity ·	۵	Please select
First Language •	۵	Please select *
Postcode •	#	
		d Address t have a Postcode

- 3. Enter the child or young person's details.
- 4. Enter the **Postcode** and click the **Find Address** button to display the **Address Details** page.

House Number	*	Ē	)
House Name	*		]
Building Name	*		]
Street Name	*		]
District / Village	*		]
Town	*		]
County	*		]
Postcode *	*		]
Country	0	▼ 	]
	Find	d Address	
Cancel			Save Child

- 5. Enter the required address details.
- Click the Save Child button to display the Forms page. The page displays all forms appropriate for the logged on verified professional. For more information on completing a SEND form, see <u>Completing and Submitting a Professional Portal SEND Form</u> on page 59.

## **Messages**

Messages are sent from the local authority, informing the professional user of the following processes:

- The status of any reviewed SEND forms.
- Authentication to share portal information.

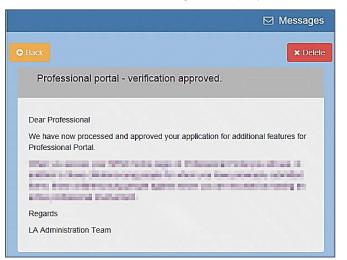
The user must log in to the Professional Portal to view the message details.

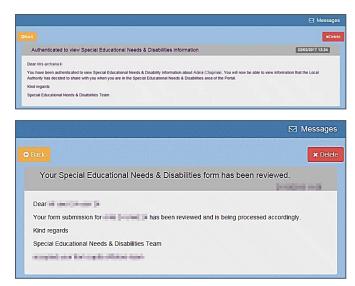
To view their messages, the professional user completes the following procedure:

1. Select Professional Portal | Home | Messages to display the Messages dialog.

	⊠ Messages		
Subject 🕈	Received -		
☑ Your Special Educational Needs & Disabilities form has been reviewed.	10.000.007.000		
Professional portal - verification approved.	Erita Eritatia		

2. Select the individual message to display the contents.





As soon as the form has been approved, the read-only SEND form can be viewed in the v4 Client via Focus | People | Students | Chronology.

For more information, see <u>Student's Chronology</u> on page 41.

# 07 Appendix

## **Frequently Asked Questions**

#### Question:

Why does the *Process for EHC needs assessment and EHC plan development* diagram not show if a child or young person's case has gone to mediation or tribunal, if they are unhappy during the assessment process?

#### Answer:

This diagram is designed to be a simple snapshot for parents, young people and professionals (Portal users) to understand what stage of the assessment process a particular child or young person is at. As a result, it was designed to be linear with no branches. The percentage of citizens accessing the Portal with mobile devices is very high, so a diagram with no branches makes it easier for them to view without having to scroll excessively sideways to see what stage the child or young person is at.

Keeping the diagram simple also means that there aren't an abundance of business rules which affect it; meaning it is easier for LA staff to understand how what they enter on to a child or young person's involvement form reflects on their diagram.

#### **Question:**

I don't know how many files a Citizen or Professional user may want to upload to a Portal form and they can only upload one file per question. What should I do?

#### Answer:

Using the Form Builder, you can create a **Question Group** which contains only one **File** question. If this question group is set to be a **Repeating Group**, then it is possible for the Portal user to select the **Add More** button which repeats the question group and therefore any questions in the question group. This enables the Portal user to upload multiple files to the form.

Planning the design of forms is <u>essential</u>. For example, a question that will only be answered once (such as a text question asking *Views on how child/young person is doing in education*) should not be in the same question group as a question that may need to be answered multiple times (such as a file question asking for *Include supporting evidence*). This is because if this question group is set to be a repeating group just to cater for the file question, then having the other questions repeat would be redundant and left blank by the Portal user.

**Note:** Having questions where the answer can be inherited multiple times in repeating question groups can lead to incredibly complex scenarios when creating forms from a child or young person's chronology. Forms should not be designed in this way, as they may not behave as expected.

#### Question:

How can I share an electronic version of an EHC Plan to authenticated Portal users that are involved with a child or young person?

#### Answer:

An EHC Plan can be shared electronically using two methods:

- As the EHC Plan is a legal document, your local authority may want the format of the electronic EHC Plan to look exactly the same as the paper copy. If so, a form can be designed using the Form Builder which contains a File question. The local authority can then upload a PDF or Word document to that file question and then share that form on the Portal. This enables all authenticated Portal users to download the EHC Plan from the Portal.
- 2. If the local authority develops an EHC Plan using forms in One (either EHCP forms or SEND Portal forms that are stored on a child or young person's chronology), then this form can be shared. As the content of the form being shared is viewed via the Portal user's browser, it will not look identical to a paper version of the EHC Plan, but the content will be the same.

#### **Question:**

Why should I record an **Authentication Reason Memo** for users that are in the **Portal Sharing** panel?

#### Answer:

This memo has been provided so the local authority can record their decision on whether they will share SEND related information with relevant Portal users. Advice from the DfE in the *Information sharing advice for safeguarding practitioners* document states:

Information sharing decisions should be recorded whether or not the decision is taken to share. If the decision is to share, reasons should be cited including what information has been shared and with whom, in line with organisational procedures. If the decision is not to share, it is good practice to record the reasons for this decision and discuss them with the requester.

This memo can also be used to record how the local authority proved the Portal user account matches the identity of the person they wish to share information with.

#### **Question:**

Why is Two Factor Authentication (2FA) required when Portal users try to access the SEND area?

#### Answer:

The use of two authentication factors to access a system provides an extra layer of protection; it asks the user that is attempting to login to prove their identity based on more than just their basic login details. As SEND Portal Plus is sharing out information from One via the Citizen Portal and the Professional Portal, 2FA was deemed to be a necessary feature for users to access this area.

#### **Question:**

No virus scanning takes place when an LA user uploads or downloads a file to a form. What happens if a form created by the LA, with a malicious file, is shared to Citizen users and Professional users? Will they download the virus?

#### Answer:

A malicious file would need to have breached the local authority's internal security systems before it can even be uploaded to a form in Capita One. However, if a virus is uploaded to a form which is shared with Portal users, the Citizen users and the Professional users will receive the following message when navigating to the form:

There was a problem completing the requested action.

This prevents the Portal users from downloading the malicious file.

**Note:** A virus scan takes place when Portal users are uploading files to forms, preventing them from being able to send a virus to the local authority.

#### **Question:**

How do I keep track of which professionals I have requested advice from via letters and emails using timelines and which professionals I have requested advice from using Portal message alerts?

#### Answer:

It is recognised that there will be a transition period where there will be a mix of people involved in SEND processes using the Portal, and a mix of people still using more traditional methods of communication (e.g. letters).

During this period, it may be necessary to send out duplicate notifications – such as letters using **Timelines** and Portal messages using the **Information Requested** functionality in involvement forms. The benefit of doing this is that a professional receives a Portal message alert instantly, compared to the posted letter asking them to submit advice. As a result, if the professional then submits their advice earlier because they were notified earlier, then this will help local authorities meet their statutory timescales for EHC assessments and plan development.

As a result, local authorities using **Timelines** functionality may find it necessary to check both the **Information Requested** panel on a child or young person's involvement, as well as their timeline, in order to keep track of this process.

#### **Question:**

Why is the **Communication Log** not updated when I send a **Portal Message Alert** to an authenticated Portal user?

#### Answer:

This is because the communication log only allows entries to be recorded against a One Person and Portal message alerts are sent to Portal users.

If functionality like this was to be introduced in the future, local authorities would have to link Portal users to a One Person, so that the system would know which person to store the Portal message communication log entry against.

#### Question:

How do I automatically put files that are uploaded on to Portal forms in to an external document management system?

#### Answer:

There is no functionality available to automatically store files uploaded to Portal forms to an external system. However, it is possible for a local authority user to download a file from a form and manually store it outside of the Capita One system.

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