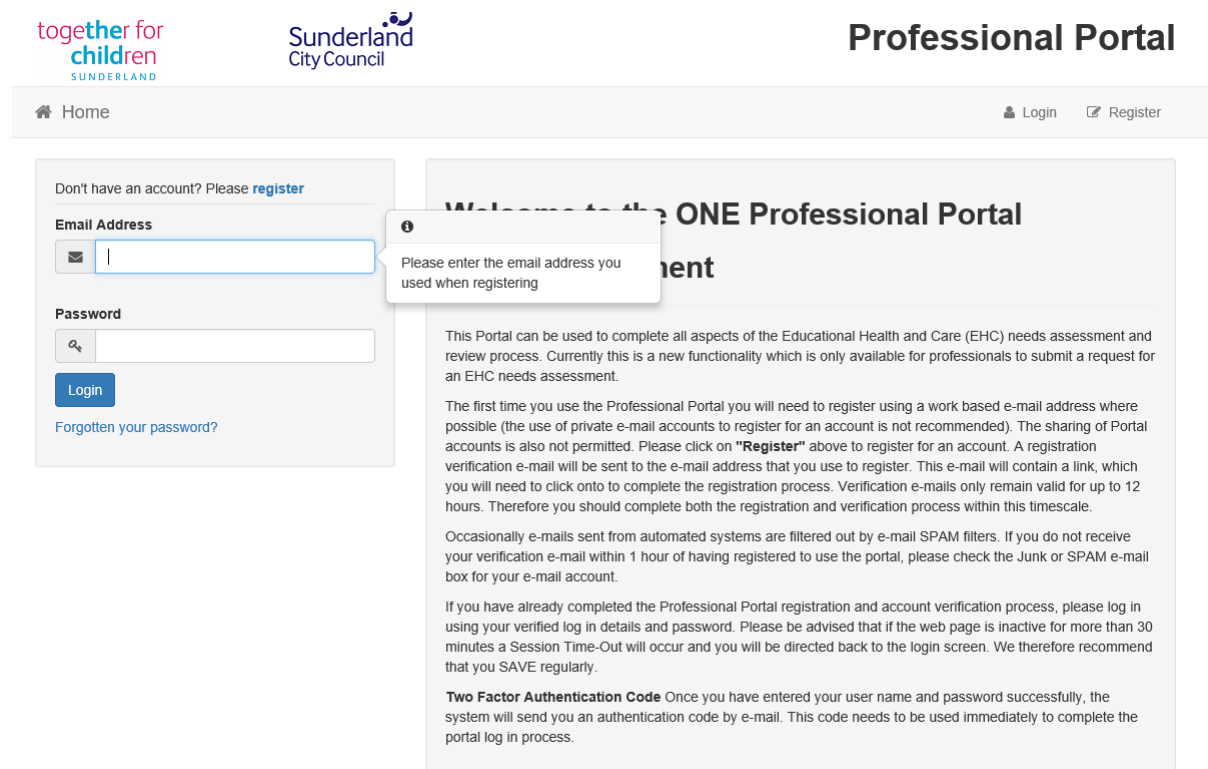


Guidance for use of the Captia Professional Portal

Access the Capita Professional Portal Live environment at [Professional Portal Live](#).

You will now need to register on the Professional Portal using your professional/work email address. The Professional Portal will be used by school staff e.g. SENDCOs and other professionals that support children and young people with an EHCP or who are going through an EHC Needs Assessment.

All users of the Professional Portal are required to self-register. These registrations will then be verified in the back office by the SEND Team, so SEND information/data from the back office can be shared via the portal with these professionals.



The screenshot shows the Professional Portal interface. At the top left are the logos for 'together for children SUNDERLAND' and 'Sunderland City Council'. At the top right is the title 'Professional Portal'. Below the logos is a navigation bar with 'Home', 'Login', and 'Register' links. The main content area is divided into two sections. On the left is a registration form with fields for 'Email Address' and 'Password', a 'Login' button, and a link for 'Forgotten your password?'. On the right is a large text box titled 'Welcome to the ONE Professional Portal' containing detailed instructions for registration and login. A tooltip is visible over the 'Email Address' field, stating: 'Please enter the email address you used when registering'.

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

Email Address

Password

[Login](#)

[Forgotten your password?](#)

Welcome to the ONE Professional Portal

This Portal can be used to complete all aspects of the Educational Health and Care (EHC) needs assessment and review process. Currently this is a new functionality which is only available for professionals to submit a request for an EHC needs assessment.

The first time you use the Professional Portal you will need to register using a work based e-mail address where possible (the use of private e-mail accounts to register for an account is not recommended). The sharing of Portal accounts is also not permitted. Please click on **"Register"** above to register for an account. A registration verification e-mail will be sent to the e-mail address that you use to register. This e-mail will contain a link, which you will need to click onto to complete the registration process. Verification e-mails only remain valid for up to 12 hours. Therefore you should complete both the registration and verification process within this timescale.

Occasionally e-mails sent from automated systems are filtered out by e-mail SPAM filters. If you do not receive your verification e-mail within 1 hour of having registered to use the portal, please check the Junk or SPAM e-mail box for your e-mail account.

If you have already completed the Professional Portal registration and account verification process, please log in using your verified log in details and password. Please be advised that if the web page is inactive for more than 30 minutes a Session Time-Out will occur and you will be directed back to the login screen. We therefore recommend that you SAVE regularly.

Two Factor Authentication Code Once you have entered your user name and password successfully, the system will send you an authentication code by e-mail. This code needs to be used immediately to complete the portal log in process.

Please click to register and follow the instructions to complete registration. Once complete, enter your email address and the password that you have created. A verification email will be sent to you by your email address for security purposes. This will happen every time you log into the Portal.

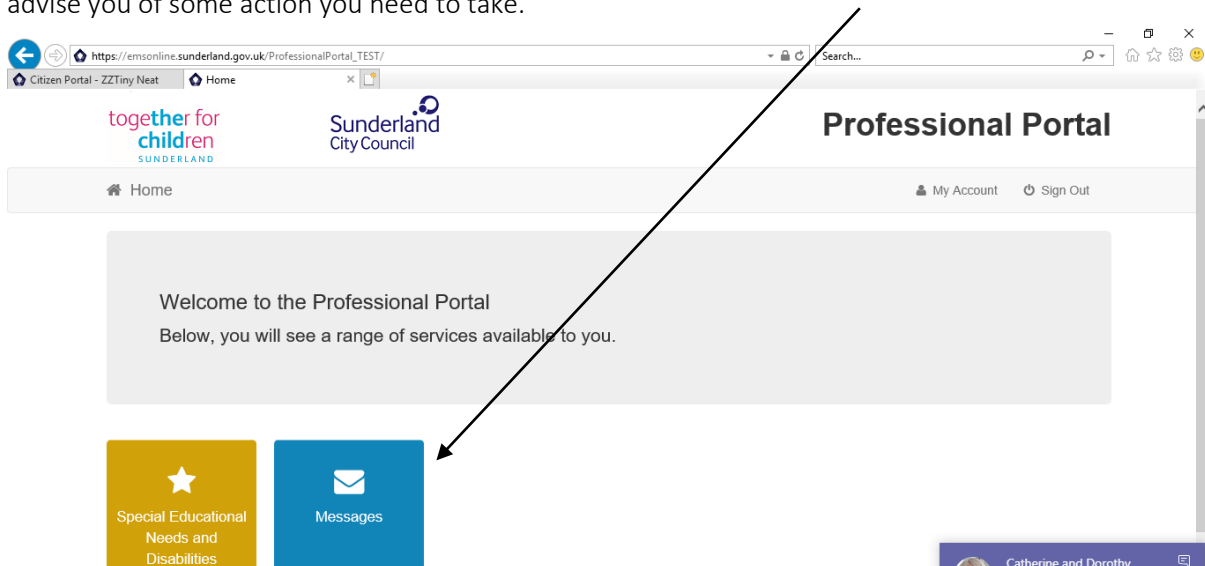
Verification Code sent

Your Verification Code has been sent.
Please enter your Verification Code to continue.

Your Verification Code *

Verify

You will then be taken to the Professional Portal Home Screen. There are two tiles only as this is currently only being used by SEND. You will need to use the messages tile to access any messages that are generated from the system, either to advise you that a Portal form has been submitted or to advise you of some action you need to take.



If you click on the SEND tile this will take you to the SEND Home area. This is likely to show no child, so you will need to add details of the child or young person by clicking the 'Add Person' button.

Select Person

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

Person Filter Active

Name	Date of Birth	Address	School	Select
Neat, Margaret	08/11/2011	Stanfield Centre, Addison Street, Sunderland, SR2 8SZ		<input type="checkbox"/>

Select the child's record you wish to complete a Portal form for by either clicking the hyperlink on the child's name or by ticking the 'Select' box at the right-hand side (see above). This will ask you to verify the details of the child you have selected and then click the 'Continue' button at bottom right hand side.

Add Person

Please enter child details before proceeding. Fields marked with * are mandatory.

Forename *

Middle Name

Surname *

Gender *

Date of Birth *

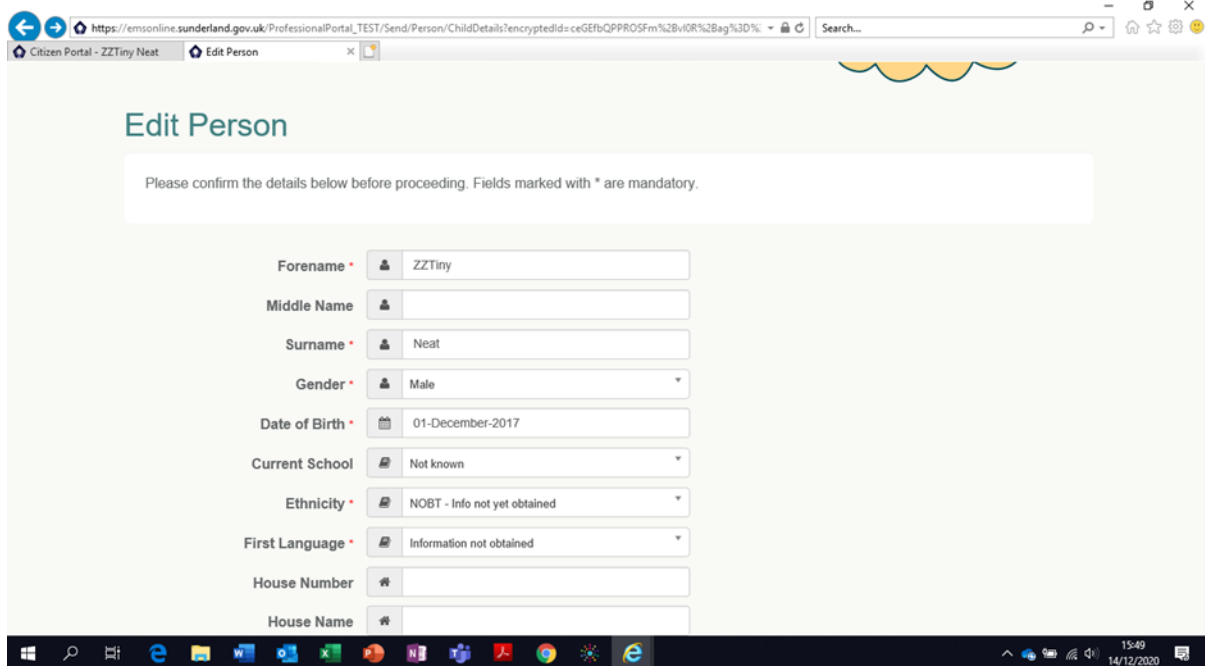
Current School

Ethnicity *

First Language *

Postcode *

You can also complete the child's details to create a record using 'Add Person'. If there are a large number of records, you can use the 'Person Filter' search facility or drop down to select 'Active', 'Hidden' or 'Recent 18 months'. There is also a 'Hide Person' facility, if not currently working on these forms (see above).



Edit Person

Please confirm the details below before proceeding. Fields marked with * are mandatory.

Forename * ZZTiny

Middle Name

Surname * Neat

Gender * Male

Date of Birth * 01-December-2017

Current School Not known

Ethnicity * NOBT - Info not yet obtained

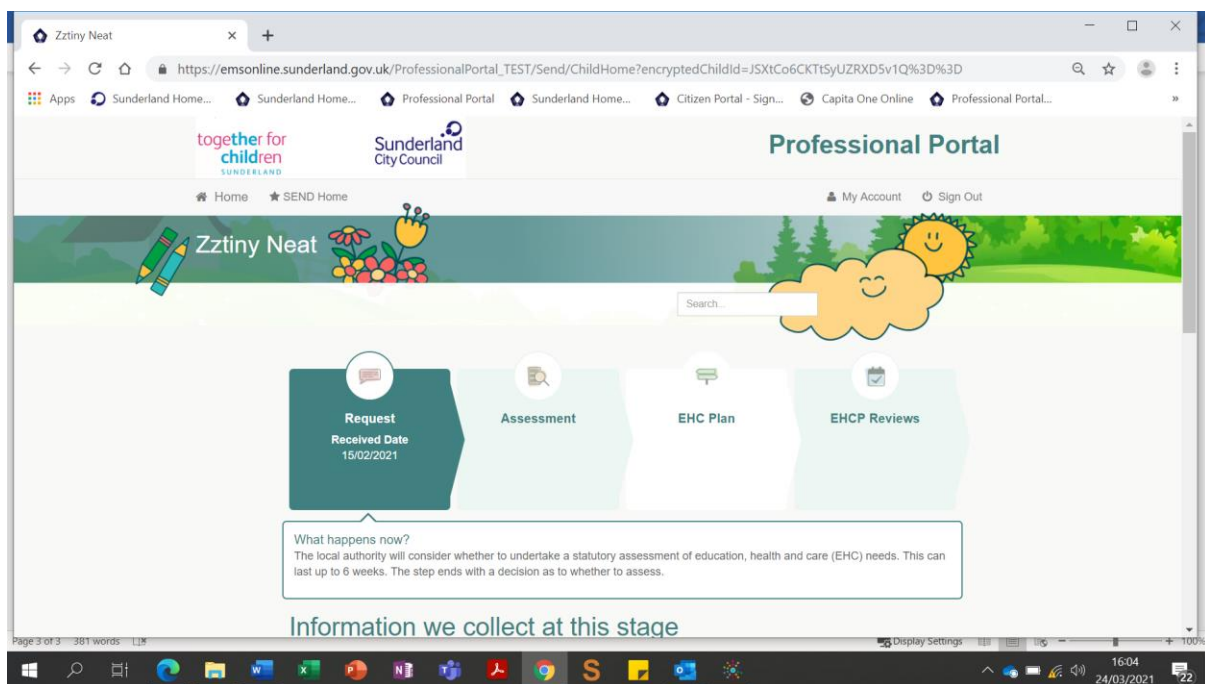
First Language * Information not obtained

House Number

House Name

What next?

This will then take you to the SEND Home Screen (see below). The top of this screen shows you which stage of the process you are currently in depending on the highlighted area. Longer term, each of these sections will also be populated with key dates within each section that can be viewed by both professionals and families through both portals. For example, date request received, decision to assess due date etc.



Professional Portal

Zztiny Neat

Request Received Date 15/02/2021

Assessment

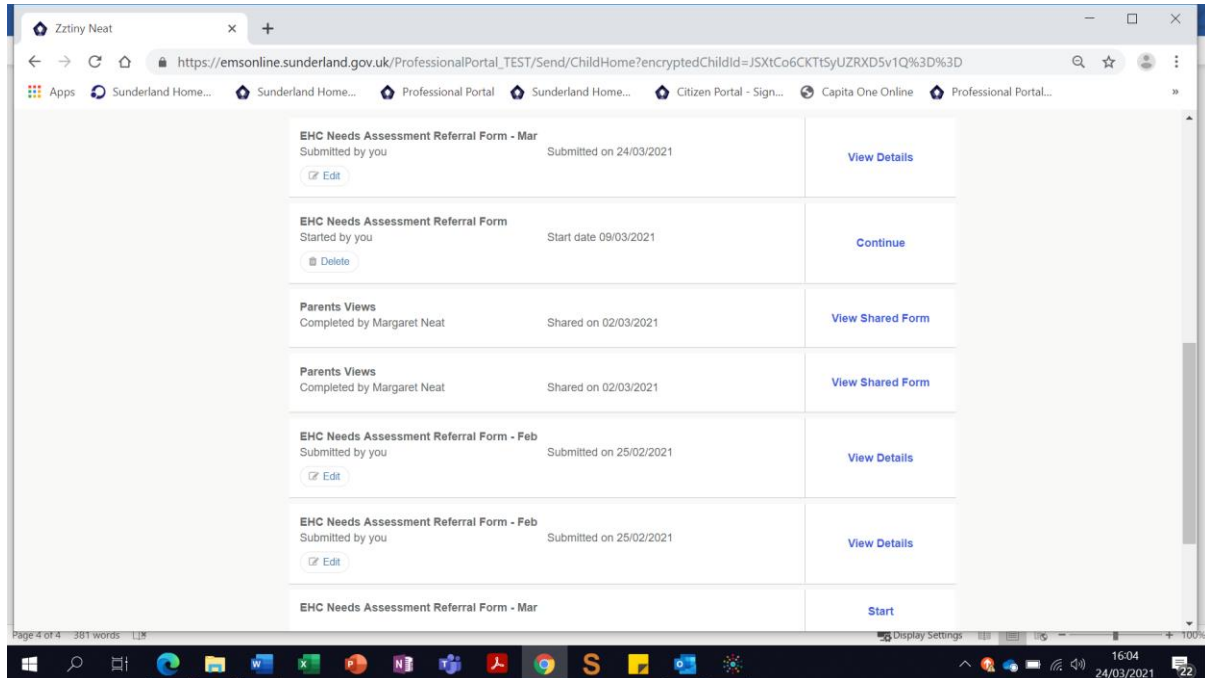
EHC Plan

EHCP Reviews

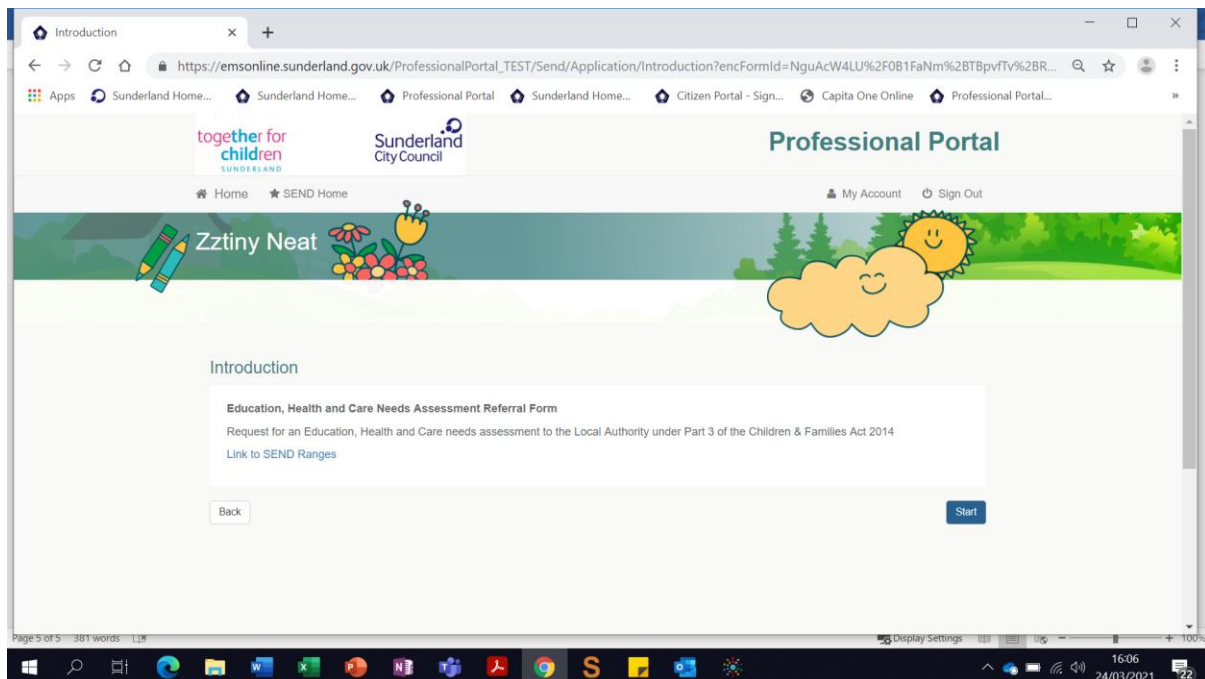
What happens now?
The local authority will consider whether to undertake a statutory assessment of education, health and care (EHC) needs. This can last up to 6 weeks. The step ends with a decision as to whether to assess.

Information we collect at this stage

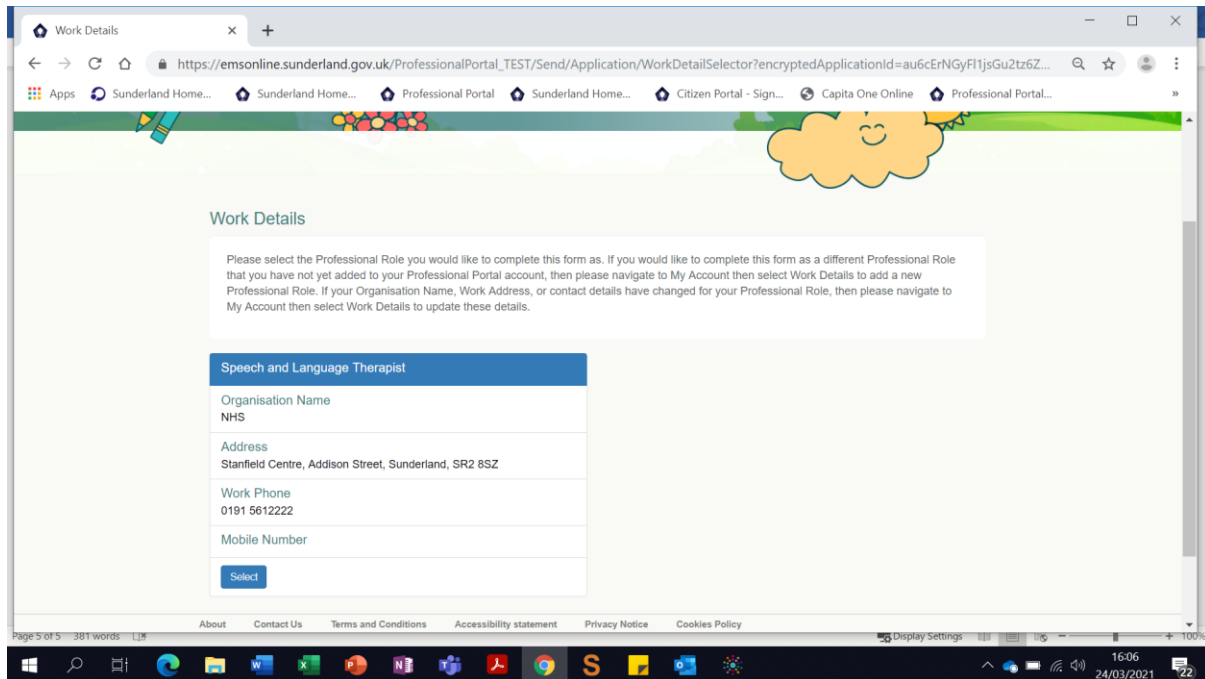
The bottom of this screen shows the forms that are available to you or that have been shared with you (see below).



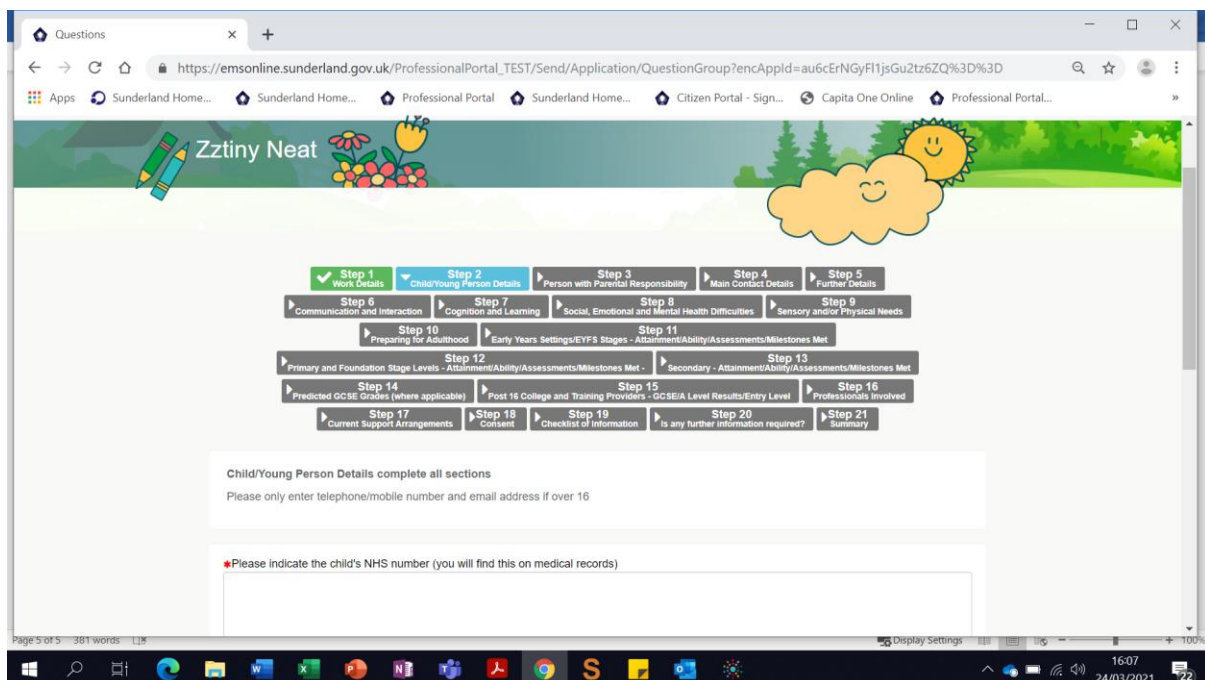
If you click 'Start' at right of form, it will take you into the introduction to the form. The SEND ranges are included here as a link for ease of reference.



It will first ask to confirm you details as the professional.



If you click 'Start' this will take you to the beginning of the form.



You will need to complete each step. As each step is saved this will turn green. This will mean that if you need to leave the form and complete later, you can return to any step that has already been completed and shows as green.

PLEASE NOTE: YOU WILL BE TIMED OUT AFTER 20 MINUTES, SO IF YOU NEED TO LEAVE THE FORM YOU WILL NEED TO ENSURE YOU HAVE COMPLETED THAT SECTION AND CLICKED SAVE AND CONTINUE TO ENABLE YOU TO RETURN TO THIS SECTION.

Summary

The information entered as part of EHC Needs Assessment Referral Form - Feb - 15/02/2021 form is displayed below.

Form submitter details

Jenny Ritchie
Professional Role Speech and Language Therapist
Organisation Name NHS

Child / Young Person Details

ZZ Tiny Neat
Gender Male
Date of Birth 01-Dec-2017
Current School

Form Details
 Child/Young Person Details

Please indicate the child's NHS number (you will find this on medical records)

Before submitting the Portal form you be given a summary to view the whole of your form, details and any upload documents. This will allow you to return to a previous step if you feel you wish to edit.

No

If you have answered YES please attach relevant report(s)

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

I agree

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

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

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

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

I agree

[Back](#) [Submit](#)

Once you are happy with the form you will need to tick both declarations and then press 'Submit' at bottom of the page.

If you wish to return to the form you can do this from the SEND Home page by clicking 'Edit' and giving the reason for editing the document.

If you have any queries or question please do not hesitate to contact Alison Armstrong on alison.armstrong@togetherforchildren.org.uk or 07919 395 633.