




EHCP SYSTEMONE USER GUIDE ADMIN

For teams/services who do not receive an initial/first notification of an EHCP

- 1 Search & register patient
- 2 Record new referral
- 3 Add to waiting list
- 4 Save record
- 5 Contribution completed
- 6 Review completed
- 7 Go ahead letter not received

1. Search & register patient

- Click  enter the NHS number or name into the Name search box and click Search
- If the patient is not listed
 - Click on 
 - Enter the NHS number
 - Click Search
 - Select the patient in the list
 - Click on the little 'Green tick'  by the name and details of the patient
 - Follow the appropriate instructions below for adding the referral

If a Spine Record differences **box** appears, select the **box** which is use all spine values, then click on OK.


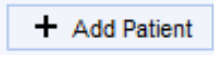
2. Record new referral

Do this for newly registered patients as well as patients already registered.

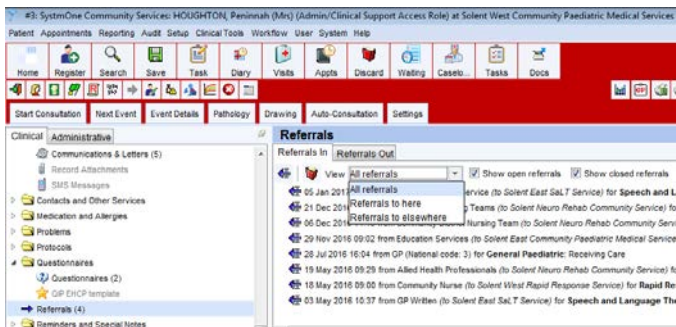
- The referral in box will appear, complete as follows:

1. Select **EHCP** for Service offered
 2. Select **Routine** as urgency
 3. Select **SEND** as the Referral source
 4. Enter the referral date from the
 5. Select **EHCP Health Contribution** as the Primary Referral In Reason
 6. Enter the referral date as the Date of Action
 7. Select **Accepted** for the Outcome
 8. Select **Waiting for Information** as the Referral status
 9. Leave the Default contact location blank
 10. Select the relevant **EHCP caseload** i.e. Hampshire East, Hampshire West, Southampton or Portsmouth
- Untick RTT
 - Scan the letter onto the patient's record using the letter type of **EHCP – Letter – Go ahead.**

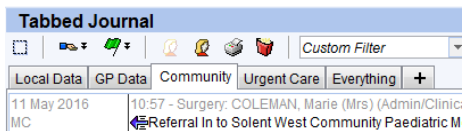
3 Add to waiting list

- Click on the Waiting list icon: 
- Go to the appropriate waiting list: to **EHCP Go ahead received Hampshire East/West/Southampton/ Portsmouth** Click **Add patient icon:** 
- Add due date of 6 weeks from date initial notification has been received and time of 5pm.

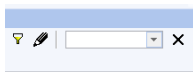
- Add any notes if required at the **Add patient to waiting list** box, then click OK. If for Hampshire East, add a note to say F&G (if Fareham and Gosport) or H&P (if for Havant and Petersfield).
- Go to Referrals on clinical tree
- In the view, change it to **All referrals** and tick to show closed referrals:



- Look on the Tabbed journal to see who the last clinician was that was involved for each service the child has an open referral with. Ensure that you have the **Community** tab open:

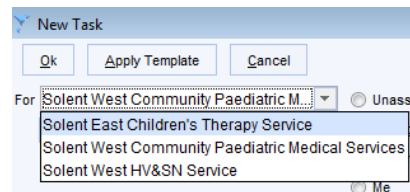


- To help with searching the tabbed journal, you can enter the name of the service you are looking for in the search field:

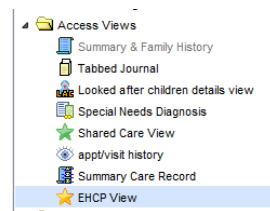


- If the patient has had no contact with any Solent service, then follow the process as per section 7 in this guide.

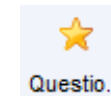
- Click on Task icon to create a new task. Click **Apply template** then double-click on **EHCP Go ahead letter**.
- Click OK
- Click to select to send to the relevant unit by changing the **For** drop down:



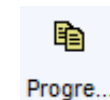
- Next select the **Staff member** and select the clinicians within each service who need to receive the task. Click OK.
- Add a due date of 5 day's time at the bottom of the new task box.
- Repeat for each member of staff you need to send a task to i.e. each clinician who has been involved with the child.
- Click OK.
- Go the Access Views folder on the clinical tree. Click on the EHCP View to open it in the right hand side:



- Click on the icon for the EHCP questionnaire:

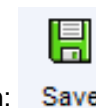


- The EHCP questionnaire will open in a new window.
- Complete questions 1 and 2. If you know the name of the educational setting from the go ahead letter then write this in question 6.
- Click **Save for future editing**
- Please bear in mind that the EHCP View is visible to all Childrens services units.
- Once the questionnaire has been started, right click and select **Amend questionnaire** to make any changes to it. **Do not** start a new one by clicking on the questionnaire icon again.
- **There should only ever be one questionnaire open per child.**
- Add Note to **Progress note EHCP** if required – this can be accessed from the EHCP view as well



by clicking on this icon:

4 Save the record



- Click on the Save icon:
- An **Event details** box will appear.
- Click on **EHCP Go ahead started** from the Template drop-down box Click **Apply template**.

- Link to the ECHP referral.
- Click Ok.

The clinicians will now receive your tasks and will reply to say whether it is them who will be contributing, if someone else in the service is contributing or if no-one in the service is contributing.

If clinician you send task to replies to say they will be contributing:

- Once task is received back from clinicians, then add the clinicians name to the patient's waiting list notes.
- Reply to task to clinician by updating with the due date using the task template of **EHCP report due date**. Enter the due date minus one week into the body of the task.

If clinician replies to say someone else in their service will be contributing:

- Once task is received back from clinicians, add a **EHCP progress note**, if required, to state the name of the clinician it has been suggested will contribute.
- Send that new clinician an **EHCP Go ahead started** task with a due date of 5 working days.

If no reply from task within 5 working days (i.e. the tasks of type EHCP Go ahead letter have turned red in the Tasks list):

- Add progress note to say that Clinical Co-ordinator has been chased.
- Send task to relevant Clinical Co-ordinator* using the **EHCP Chase - No response from Go ahead** task template.

If no contribution is required from any service:

- Notify SEND team via email or using reply form that Solent will not be contributing.
- Right click on the relevant **EHCP Go ahead received** waiting list and select **Remove patient**
- At the question box, select **Completed**
- Go to referrals on the clinical tree, click on the EHCP referral, right click and select **End referral**
- Select Discharge Intervention of **Discharged – EHCP information not required**
- Click OK
- Save record using **EHCP Admin** event details template.

5 Contribution completed

- The clinician contributing will send a task to admin once they have completed their contribution using the task type of **EHCP Contribution completed**
- Retrieve the patient from task and go to the EHCP view on the Clinical tree.
- Go to the EHCP questionnaire which has already been started.
- Right click and select **Amend questionnaire**.

- Complete question 3 by selecting the service who have just informed you that they have completed their contribution.
- Click on **Save For Future editing**
- Save the record using the **EHCP Admin** event details template.

If your clinician dictates their contribution:

- Open the patients record.
- Go to the **EHCP view**
- Right click on the started questionnaire, select **Amend questionnaire** go to section 2 and type in the relevant fields as per dictation.
- Click **Save for future editing**
- Save the record using the **EHCP Admin** event details template.

Checking if all contributions have been received:

- Go to the relevant **EHCP Go ahead received waiting list** for your area.
- Sort by **Due Date** (click on the column header called **Due Date** to do this).
- For patients who are less than 10 days away from their due date, retrieve their record.
- Go to **EHCP View**.
- Open **EHCP questionnaire** by clicking on the arrow head next to the ? icon. **DO NOT** click on the yellow star icon for Questionnaire as this create a new one.

- Check whether you have received information from each of the services who have been sent a notification.
- If information has **not** been received from all services, then send reminder tasks to clinicians that have not responded using the task template called **EHCP report due**.
- If information **has** been received from all services, send a task to the Reviewer (Clinical Co-ordinator*) for your area who will be the reviewer/perform the quality check using the task template called **EHCP for review**.
- Save the record using **EHCP Admin** event details template.
- If at one week before the due date you are still missing some contributions, please send a task to the Clinical Co-ordinators* using the **EHCP Chase No contribution** task template.
- Save the record using **EHCP Admin** event details template.

6 Review completed

- Once the reports have been reviewed, the Reviewer will reply to the task.
- Open the started EHCP questionnaire from the EHCP View by right-clicking and selecting **Amend questionnaire**.

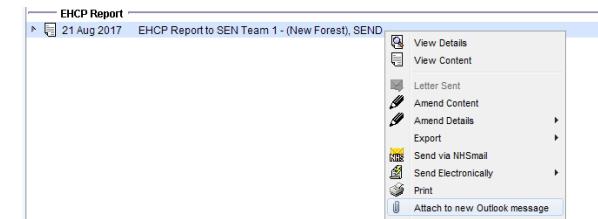
- Complete the questionnaire, if required. Click **Save Final Version**. Say **Yes** to the warning box which appears. Please be aware that the questionnaire can only be finalised in the SystemOne unit it was opened in. Once saved no amendments can be made to it.
- Click on the **Report...** icon on the EHCP view to



start a new letter:

- Select who the sender is from the **Trust contacts** tab of the address book – select your base.
- Select who the recipient is from the **Trust contacts** tab of the address book (the SEND teams are all in one folder called SEND).
- If you cannot find your base in the address book, please log a call with CGI to get this added. While you wait for this you can select the closest address and then amend at the **New letter** screen.
- Click on **Write now** icon.
- The report will open in Word and the fields that have been completed in the questionnaire will pull through to the report.
- Format the report in Word at this stage if required.
- Print letter if required to send to SEND in paper format.
- Click on **Save Final version**.
- If you are emailing the document, then right click on the report from the EHCP view and select

Attach to new Outlook message:



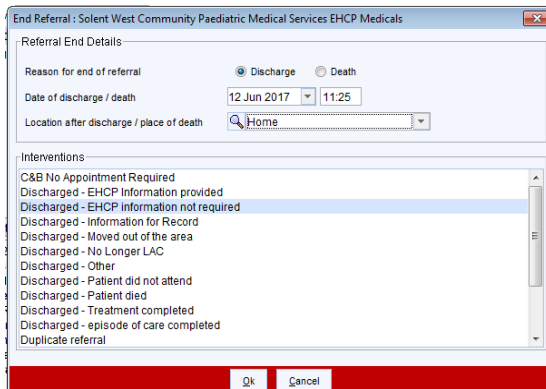
- A new Outlook message will appear with the EHCP report attached. Enter the email address of the SEND team you are sending it to and a subject and content of the email.
- Click on **Send**.
- Remove the patient from Waiting list and mark as Wait Completed.
- End the referral using the reason of **Discharged - EHCP Information provided**.
- Save record using the **EHCP report sent** event details template.

7 Go ahead letter NOT received

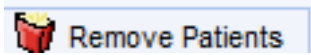
If you have not heard from Council after 6 weeks (at waiting list due date) chase Council to find out what is happening. If 'go ahead letter' is not received:

- Open patient's record from waiting list or by searching for them
- Go to **Referrals**
- Right click on the **EHCP** referral and select **End referral**.

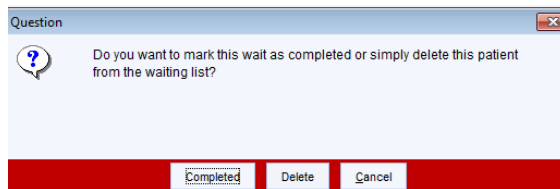
- At the End referral box, select **Home** as the location after discharge/death and **Discharged – EHCP information not required** as the intervention:



- Click OK
- Find patient on **EHCP Go ahead received Hampshire East/West/Southampton/Portsmouth** waiting list



- Click on **Remove Patients**
- Select **Completed** at the question box which appears:



- Send a task to any clinicians you have already notified using the task template of **EHCP refused by LA**.
- Save the record using the **EHCP Admin** event details template.

***Clinical Co-ordinators:**

Portsmouth – Neil Smith
 Southampton – Polly Sadler
 Hampshire East – Carol Quint & Gemma Moore
 Hampshire West – Polly Sadler to confirm

Please only send tasks to them at their usual SystemOne units as they may not regularly access other units. Details of their usual units are below:

Neil Smith – Solent East Children’s Therapies
 Polly Sadler – Solent West Children’s Therapies
 Carol Quint – TBC
 Gemma Moore – TBC
 Karen Brown - TBC

If the patient is not registered in their usual unit you will not be able to do this so please email them instead as high importance with EHCP in the subject of the email.

If you need any help with this please contact the CGI IT helpdesk on 0345 605 1334 and log a call for the Patient Systems team to call you back to help you.