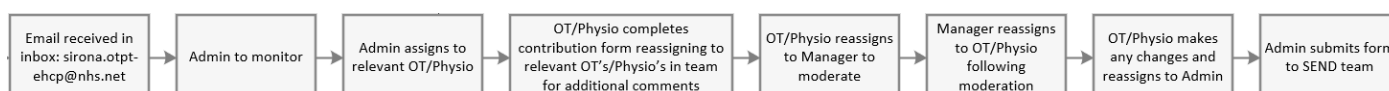


Completing the EHC Needs Assessment Contributions Form – Guidance Occupational Therapy and Physiotherapy

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Introduction

The new EHC Needs Assessment Contributions form should be completed on Bristol City Council's Professional Portal. The purpose of this form is to capture contributions to a child/young person's statutory Education, Health and Care (EHC) Needs Assessment.

The Professional Portal is for 'external' professionals such as Educational settings, Health and other independent organisations/individuals.

It allows professionals to fill in 'forms' relating to children/young people they are working with and submit them securely to Bristol City Council's case management system, Liquidlogic. Submitted forms can then be viewed (as read only) by the relevant team/s, for example SEND.

This guidance is designed to support therapists to fill in the EHC Needs Assessment Contributions form on the portal, managers to moderate and Admin who triage and submit these forms to SEND.

For general guidance on using the Professional Portal (for example registering, logging in/out, how to get support), please follow the guidance called **Using the Professional Portal – Guidance for Professionals**.

Important: Anything you enter in the contribution form will be shared with the young person/parents/carers and other professionals involved with the young person. It will appear in the EHCP (if there is a decision to issue). Please consider this when writing your contribution.

Receiving and triaging the EHC Needs Assessment Contributions form (Admin)

When Bristol's SEND team are requesting an EHC Needs Assessment Contribution from Occupational Therapy/Physiotherapy, they will delegate the form to the **OT & Physio EHC Contributions** group on the Professional Portal.

All Admin staff, therapists and managers have access to pickup, reassign, complete and submit forms sent from this group. However it is Admin who will triage the forms and send them to the relevant therapist for completion. Admin will also be responsible for submitting the forms back to SEND once the therapists have filled in the details (and managers have moderated).

1. When a form is assigned to the group, an email will be sent to the sirona.otpt-ehcp@nhs.net email address which will be monitored by Admin:

New SEND form to complete

A new form has been delegated to you on the Professional Portal.

Please complete and submit this form by 15-Jun-2022.

[Log in](#) to the portal to complete the form. If you have not already done so you will be required to [register](#) for access using this email address.

The email will include the statutory due date for the contribution to be completed by.

2. The Admin worker on duty should then log into the Professional Portal (see **Using the Professional Portal – Guidance for Professionals** for guidance on how to do this).
3. Once logged into the portal, navigate to the form (which will be in the group ready to be picked up):

Currently Assigned Tasks

Recently Retracted Tasks

Recently Submitted Tasks

Tasks Assigned to your Work Groups

Work Group	Form Type	Name	Due Date	Comments
OT & Physio EHC Contributions	EHC Needs Assessment Contributions	Jimmy Example	15-Jun-2022	Pickup

The child/young person's name will be displayed, along with the statutory due date for the contribution to be completed by.

4. Click **Pickup** to open the form. This will assign the form to you (meaning no one else can access it):

Tasks Assigned to your Work Groups				
Work Group	Form Type	Name	Due Date	Comments
OT & Physio EHC Contributions	EHC Needs Assessment Contributions	Jimmy Example	15-Jun-2022	Pickup

5. Review the details on the first tab:

Professional Portal

1 Health - Occupational Therapy (OT) & Physiotherapy

- Professional Contribution to EHCNA
- Attach supporting documents

Name: Jimmy Example DOB: 06-Feb-2014
Form Type: EHC Needs Assessment Contributions

Required By: 15-Jun-2022
Sent By:
Department: EHM
Telephone:
Address: EHM

Health - Occupational Therapy (OT) & Physiotherapy

Child/Young Person Key Information

First name: Jimmy

Last name: Example

Preferred name: Jimmy

Preferred pronoun: He

e.g. They/She/He

This page will display read only details held by Bristol City Council about the child/young person. Use this information to make a decision about which therapist should complete the contribution.

Note: if this is a child/young person in case, the 'Placement Address' will be displayed on this page:

Is this child/young person in care? ☒ Yes ☐ No

CiC Legal Status:

Full Care Order

Full Care Order, Interim Care Order, Section 20 or other.

Placement Address:

Only applicable to Children in Care

Bristol City Council
City Hall
College Green
City Centre
Bristol
BS1 5TR

6. Once you've reviewed the details, scroll to the bottom of the page and click **Close**:

Next →

Print

PDF

Close

Save

Submit Contribution

7. Click **Re-Assign**:

Task List

Form Type	Name	Due Date	Comments
1 EHC Needs Assessment Contributions	Jimmy Example	15-Jun-2022	Re-Assign

8. A list of everyone in your group will appear (including the therapists, managers and other admin). Click **Select User** next to the therapist who needs to complete the contribution form:

Sandra Professional

sandraprofessional@mailinator.com

Select User

The form will disappear from your list of tasks and will be reassigned to the therapist:

Professional Portal - tasks to complete

There are no forms assigned to you waiting to be completed.

Currently Assigned Tasks

Recently Retracted Tasks

Recently Submitted Tasks

No currently assigned tasks

The therapist will receive an email to notify them that there's a form assigned to them for completion. Once they have filled in the form, and managers have moderated the contribution, the form will be reassigned back to the group, at which point it can be picked back up by Admin and submitted, see [Submitting the contribution to SEND and downloading a copy \(Admin\)](#).

Note: if you have reviewed the child/young person's details and found they are 'not known to service' and therefore a contribution cannot be completed, leave the form uncompleted in the portal and contact the Bristol SEND team. They will need to 'retract' the form from you so that it disappears from the portal.

Filling in the EHC Needs Assessment Contributions form (Occupational Therapist/Physiotherapist)

It is the OT and/or Physiotherapists' responsibility to fill in the EHC Needs Assessment Contributions form on the portal. This section explains how to access and fill in the form on the Professional Portal and assign it to a manager for moderation. Following this, the form will be submitted to SEND by Admin.

Note: As this form is a joint form between Occupational Therapy and Physiotherapy, if both services need to contribute then therapists can either work on the form together (e.g. sharing computer screens) or reassign the form between them on the portal in order to complete a joint contribution.

As you work through the form you can **Save** and **Close** at any time using the buttons at the bottom of the page. Once saved the form can be accessed again any time from your

Tasks to complete page – you don't have to complete the form all in one go. It is good practice to save regularly.

1. When a form is assigned to you for completion, an email will be sent to your work email address:

New SEND form to complete

A new form has been delegated to you on the Professional Portal.

Please complete and submit this form by 27-Oct-2021.

[Log in](#) to the portal to complete the form. If you have not already done so you will be required to [register](#) for access using this email address.

Many thanks,

Bristol SEND Team

The email will include the statutory due date for the contribution to be completed by.

2. When you're ready to complete the contribution, log into the Professional Portal (see **Using the Professional Portal – Guidance for Professionals** for guidance on how to do this).
3. Once logged into the portal, you will be taken straight to the **Tasks to complete** page where any forms assigned to you will be displayed.
4. Navigate to the relevant form and click on it:

Professional Portal - tasks to complete

The following forms have been delegated to you to complete.

Currently Assigned Tasks

Recently Retracted Tasks

Recently Submitted Tasks

Task List			
Form Type	Name	Due Date	Comments
1 EHC Needs Assessment Contributions	Billie Example	27-Oct-2021	Re-Assign

5. Review the details on the first tab:

Professional Portal

1 Health - Occupational Therapy (OT) & Physiotherapy
2 Professional Contribution to EHCNA
3 Attach supporting documents

Name: Jimmy Example **DOB:** 06-Feb-2014
Form Type: EHC Needs Assessment Contributions

Required By: 15-Jun-2022
Sent By:
Department: EHM
Telephone:
Address: EHM

Health - Occupational Therapy (OT) & Physiotherapy

Child/Young Person Key Information

First name:

Last name:

Preferred name:

Preferred pronoun:
e.g. They/She/He

This page will display read only details held by Bristol City Council about the child/young person.

6. Click **Next** at the bottom of the form to get to the contribution section:

Next →

PrintPDFCloseSaveSubmit Contribution

Section A

1. The first part of **Section A** will display a read only copy of the Child/Young Person and Family Views. Review the information supplied:

All About Me - Child or Young Person's Views, Interests and Aspirations (Section A)

Here and Now

Hi I'm Billie and I communicate with others by speaking to them but I listen to people using my cochlear implants and lip reading.
I like school and my teacher Mrs Hanson really helps me. My favourite lessons are Maths, History and PE as I really like playing football. I don't like it when the classroom gets very noisy and I don't like it when changes happen that I'm not ready for - it makes me very anxious. I like my visual timetable, it really helps me and I am trying very hard to improve my handwriting.

Hopes and Dreams

I would like to be able to do more on my own like my friends, like going on the bus, riding a bike and using a computer. I would like to be able to ask for help when I need it without getting really anxious. I would like to be able to prepare my own food and possibly even try learning to swim.

Family Views and Aspirations (Section A)

Summary of key events in your child's history and how this impacts on them now:

Billie lost his hearing when he was 3 years of age after contracting meningitis. He had cochlear implants when he was 5 years old and although our family understand Billie, strangers sometimes find some of the things he says difficult to understand. Billie has settled well into school and has a small number of friends but he does become anxious quickly when out in the shops as people stare at him.

I do worry about Billie's health and also about his safety when we go out and about as he has no sense of danger. He does like going for family walks with his Mum and grandparents but has not been able to learn to ride a bike as yet.

Are there any other views and aspirations you would like to add which are not in 'All About Me'?

I would like Billie to become more independent and learn to do more things for himself such as doing his shoe laces, catching the bus to school on his own (as I take him at the moment) and help more around the house.

Are there family, friends or others who are important to your child?

Mum
Grandma Barbara
Grandad Paul
Mrs Hanson (teacher)

Strengths:

Billie is a happy and chatty boy who is always smiling and loves telling jokes. He tries so hard at school even when the subject is very hard for him and is determined to do well.

2. Next you will be asked to fill in the remainder of **Section A** as appropriate to your relationship with the young person. This section should be a celebration of their strengths and qualities:

Occupational Therapy & Physiotherapy - Professional Contribution to Statutory EHC Needs Assessment (Section A):

Areas of strength identified:

Note: this question should only be answered if you have a relationship with the child/young person and/or you want to contribute in this way. It is not mandatory.

Strengths identified by OT/Physio...

From your relationship with the child/young person, what would you like to tell them about their qualities and strengths? What do you like and admire about them?

Your answer should be addressed to the child/young person. E.g. 'When we last met I noticed how kind you were to your friends and teachers'... 'I really enjoy working with you because you tell me lots of jokes, which makes me happy'... 'When we spent time together I noticed how carefully you listened to instructions and that you asked questions if you weren't feeling sure about what to do next'...

Note: this question should only be answered if you have a relationship with the child/young person and/or you want to contribute in this way. It is not mandatory.

X, you are a kind and caring person....

Olivia OT and Peter Physio

B I U S • A A A A X

If you don't know the young person well at all you may decide to leave these questions blank.

Note: It is helpful if you 'sign off' your comments as in the example above so it is clear who has written it.

Outcomes (Section E)

- Next, record any **Outcomes** you have identified (if applicable) which are in addition to those already identified by SEND. Outcomes already identified will be displayed in read only format as below.

Outcomes (Section E)

Outcomes identified with the child/young person and parents/carers based upon 'All About Me' and 'Family Views and Aspirations':

Outcomes (E): <i>Long and medium term: for the next 2-3 years / key stage</i>	Which Child and Young People's Outcomes Framework theme is the outcome working towards?
Jimmy will be able to go places with no support such as on a bus or riding a bike by the time he is 14 years old.	Independent Lives
Jimmy will be able to go out with his friends independently by the time he is 16 years old.	Family, Friends & Community
Jimmy will be able to write or type two pages of literacy by the time he is 12 years old.	Learning Employment & Positive Contr...
Jimmy will be able to feel confident in his communication with others by the time he is 13 years old.	Good Health & Wellbeing

If you wish to add additional Outcomes, record the Outcome in the first column and in the next column you should select the **Children and Young People's Outcomes Framework Theme** the outcome best relates to:

Please record any **additional long and medium term outcomes** you have identified from your involvement with the child/young person (if applicable):

Outcomes (E): <i>Long and medium term: for the next 2-3 years / key stage. Outcomes should be SMART (Specific, Measurable, Achievable, Relevant, Time-bound)</i>	Which Child and Young People's Outcomes Framework theme is the outcome working towards? Children and Young People's Outcomes Framework
Additional Outcome 1...	Good Health & Wellbeing

Full screen + -

Note: you can click on the link provided for additional information on identifying outcomes and themes under the Children and Young People's Outcomes Framework:

Please record any **additional long and medium term outcomes** you have identified from your involvement with the child/young person (if applicable):

Outcomes (E): <i>Long and medium term: for the next 2-3 years / key stage. Outcomes should be SMART (Specific, Measurable, Achievable, Relevant, Time-bound)</i>	Which Child and Young People's Outcomes Framework theme is the outcome working towards? Children and Young People's Outcomes Framework
--	--

Again, if you do not know the young person well and/or have no suggested outcomes to add, this section can be left blank.

Special Educational Needs (Section B)

- If you have identified any Special Educational Needs (B), record these in the table provided:

Special Educational Needs (Section B)

What Special Educational Needs have you identified?

Special Educational Needs category	Need (B)	Impact <i>and how does this affect the child/young person?</i>
Sensory &/or Physical Needs	Need 1....	Impact.....
Communication & Interaction	Need 2....	Impact.....

Full screen + -

Specific Provision (Section F) and additional 'Specific Strategies'

- If you have identified any Specific Provision (F), fill out the details in the table provided recording one provision per row on the table:
 - Specific Provision:** in this column you should provide a concise description of the provision that will be put in place/is in place
 - How often:** in this column you should record the length, frequency and duration of the provision if possible e.g. *20 mins, weekly, for 6 weeks*. This is important because it makes it clear to families exactly what provision they will receive and ensures provision is specific and quantifiable. It also makes it much easier to deliver and review the EHCP if there is one issued.
 - Group size:** e.g. 1:1, group of up to 20 etc. if applicable
 - By whom:** the person or professional role who will deliver the provision
 - Is the provision above core service?:** Yes/No
 - Which SEN Category will this provision meet?:** select the SEN categories identified which this provision will meet. It is essential that any need categories

identified in Section B are being met by a Provision. The picklist allows you to select multiple categories, as one provision may meet multiple need categories.

- **Which Outcomes Framework theme is this provision working towards?:** from the identified outcomes, record which Outcomes Framework theme this provision is working towards. If it applies to several select the outcome theme the provision most relates to.

Specific Provision (Section F) and additional 'Specific Strategies'

The special education provision required by the child or young person. This provision would be funded by the local authority/education. E.g. speech and language therapy.

Specific Provision - (F)	How often	Group size	By whom	Is provision at
Provision should be SMART (Specific, Measurable, Achievable, Relevant, Time-bound)	E.g. 20 mins, weekly, for 6 weeks			
Provision 1.....	1 hour, weekly...	1:1	x	No

Full screen + -

Note: You can click **Full screen** to expand the table (this will display all columns without needing to scroll)

- Next, answer the questions relating to 'Specific Strategies'. If there are specific strategies, and these are not 'Ordinarily Available Provision', a table will open allowing you to record them:

Are any additional 'Specific Strategies' required? ☒ Yes ☐ No

Is this already available in the Ordinarily Available Provision (OAP)? ☐ Yes ☒ No

[Ordinarily Available Provision](#)

Additional Specific Strategies

Over and above those which should be ordinarily available within educational settings

By whom

Specific strategies..... x

Full screen + -

Note: use the link provided to view additional information about what is counted as 'Ordinarily Available Provision'.

Health Needs (Section C)

- Record the **Health Needs** that have been identified:

What Health Needs have you identified that relate to the child/young person's Special Educational Needs?

Special Educational Needs category	Health Needs that relate to Special Educational Needs (C)	Impact <i>and how does this affect the child/young person?</i>
Sensory &/or Physical Needs	Health Need 1....	Impact.....
Social, Emotional & Mental Health	Health Need 2.....	Impact....

Full screen + -

Specific Health Provision (Section G)

- Enter any **Health Provision** required:

Specific Health Provision (Section G)

Any health provision reasonably required by the learning difficulties or disabilities which result in the child or young person having SEN. This provision would be funded via NHS England/CCG. E.g. specialist equipment or continence supplies.

Specific Health Provision - (G) <i>Provision should be SMART (Specific, Measurable, Achievable, Relevant, Time-bound)</i>	How often <i>E.g. 20 mins, weekly, for 6 weeks</i>	Group size	By whom	Is prov
Provision 1....	1 hour.....	1:1	OT	No

Full screen + -


Note: You can click **Full screen** to expand the table (this will display all columns without needing to scroll)

- Finally, record your name and select the relevant service from the picklist under **Additional information:**

Additional Information

Which teams contributed to this assessment? ☒ Occupational Therapy ☐ Physiotherapy

Name of OT:

Date OT contribution completed: 

Note: please do not enter the 'Name of Moderator' or 'Date contribution submitted to SEND', as these will be entered by Managers and Admin respectively.

3. Click **Next**:



Print
PDF
Close
Save
Submit Contribution

4. If you wish to attach additional documents (Appendices) to your contribution you can do so on the final page by clicking **Choose File**:

Professional Portal

1 Health - Occupational Therapy (OT) & Physiotherapy

2 Professional Contribution to EHCNA

3 **Attach supporting documents**

Name: Jimmy Example DOB: 06-Feb-2014
Form Type: EHC Needs Assessment Contributions

Required By: 15-Jun-2022
Sent By:
Department: EHM
Telephone:
Address: EHM

Attach supporting documents

 Upload Document  No file chosen



Print
PDF
Close
Save
Submit Contribution

Note: You can attach multiple documents if required. The accepted file types are: Word (doc & docx), PDF, JPG, PNG. The maximum file size is 10MB.

5. Click **Save** and then **Close**:

Print
PDF

Close
Save

Submit Contribution

Please **do not** click Submit Contribution.

6. You will have been re-directed to your Professional Portal home page. Click **Re-Assign**:

Currently Assigned Tasks	Recently Retracted Tasks	Recently Submitted Tasks								
<div>Task List</div> <table border="1"> <thead> <tr> <th>Form Type</th> <th>Name</th> <th>Due Date</th> <th>Comments</th> </tr> </thead> <tbody> <tr> <td>1 EHC Needs Assessment Contributions</td> <td>Billie Example</td> <td>10-Nov-2021</td> <td> Re-Assign </td> </tr> </tbody> </table>			Form Type	Name	Due Date	Comments	1 EHC Needs Assessment Contributions	Billie Example	10-Nov-2021	Re-Assign
Form Type	Name	Due Date	Comments							
1 EHC Needs Assessment Contributions	Billie Example	10-Nov-2021	Re-Assign							

7. Reassign the task to your manager (so that they can review and moderate your contribution):

Sandra Professional

sandraprofessional@mailinator.com

Select User

The form will disappear from your list of tasks and will be reassigned to the manager:

Professional Portal - tasks to complete

There are no forms assigned to you waiting to be completed.

Currently Assigned Tasks

Recently Retracted Tasks

Recently Submitted Tasks

No currently assigned tasks

They will receive an email notifying them of a form assigned to them on the portal.

Moderating the EHC Needs Assessment Contribution form (OT/Physio Manager)

Managers are responsible for reviewing and moderating forms completed by OT/Physios, signing off the form and then reassigning to the OT & Physio EHC **Contributions** group. Admin will then download a copy of the form and submit it to SEND.

1. When a form is assigned to you for completion, an email will be sent to your work email address:

New SEND form to complete

A new form has been delegated to you on the Professional Portal.

Please complete and submit this form by 27-Oct-2021.

[Log in](#) to the portal to complete the form. If you have not already done so you will be required to [register](#) for access using this email address.

Many thanks,

Bristol SEND Team

The email will include the statutory due date for the contribution to be completed by.

- When you're ready to complete the contribution, log into the Professional Portal (see **Using the Professional Portal – Guidance for Professionals** for guidance on how to do this).
- Once logged into the portal, you will be taken straight to the **Tasks to complete** page where any forms assigned to you will be displayed.
- Navigate to the relevant form and click on it:

Professional Portal - tasks to complete

The following forms have been delegated to you to complete.

Currently Assigned Tasks

Recently Retracted Tasks

Recently Submitted Tasks

Task List

Form Type	Name	Due Date	Comments
1 EHC Needs Assessment Contributions	Billie Example	27-Oct-2021	<div>Re-Assign</div>

- Review the OT/Physio contribution section, which can be found on the second tab:

Professional Portal

1 Health - Occupational Therapy (OT) & Physiotherapy
2 Professional Contribution to EHCNA
3 Attach supporting documents

Name: Jimmy Example **DOB:** 06-Feb-2014
Form Type: EHC Needs Assessment Contributions

Required By: 15-Jun-2022
Sent By:
Department: EHM
Telephone:
Address: EHM

Professional Contribution to EHCNA

Contribution due date: 27-06-2022

This is the statutory due date set by SEND

All About Me - Child or Young Person's Views, Interests and Aspirations (Section A)

Did the child/young person contribute their views in any other ways?


☐ Poster or Powerpoint
☐ Drawings
☐ Mindmap
☐ Video/audio clip

- Once you have reviewed the form and are ready to sign it off (the answers can be amended by you if required), record your name in the relevant box at the bottom of the page under **Additional information**:

Additional Information

Which teams contributed to this assessment? ☒ Occupational Therapy ☐ Physiotherapy

Name of OT:

Date OT contribution completed: 

Name of OT moderator (if applicable):

Name of Physio moderator (if applicable):

7. **Save** and then **Close**:

Please **do not** click Submit Contribution. This is because the OT/Physio will reassign the form to Admin, who will submit it to SEND.

8. Click **Reassign**:

Currently Assigned Tasks
Recently Retracted Tasks
Recently Submitted Tasks

Task List			
Form Type	Name	Due Date	Comments
1 EHC Needs Assessment Contributions	Billie Example	10-Nov-2021	<div style="border: 2px solid red; display: inline-block; padding: 2px 5px;">Re-Assign</div>

9. Reassign the form to the relevant OT/Physio by clicking **Select User**:

Users within the Work Groups you Manage

Name	Email	
Gabriel Professional	gabrielprofessional@mailinator.com	<div style="border: 2px solid red; display: inline-block; padding: 2px 5px;">Select User</div>
George Professional	georgeprofessional@mailinator.com	<input type="button" value="Select User"/>

They will receive an email to notify them that a form has been assigned to them.

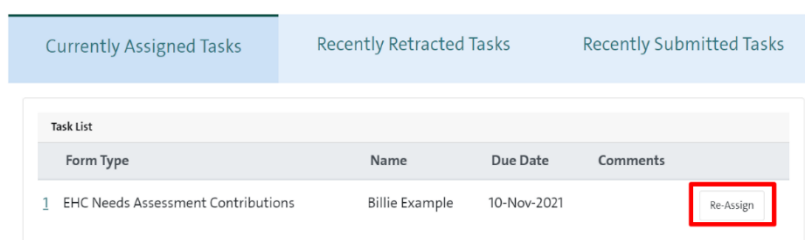
Making amendments and assigning to Admin following moderation (OT/Physio)

Once the manager has reviewed the contribution, they will assign it back to the OT/Physio on the Professional Portal. You will receive an email as before to say that a form has been assigned to you.

You may be required by the manager/s to make some changes to your contribution, in which case you will need to click on the form and update it.

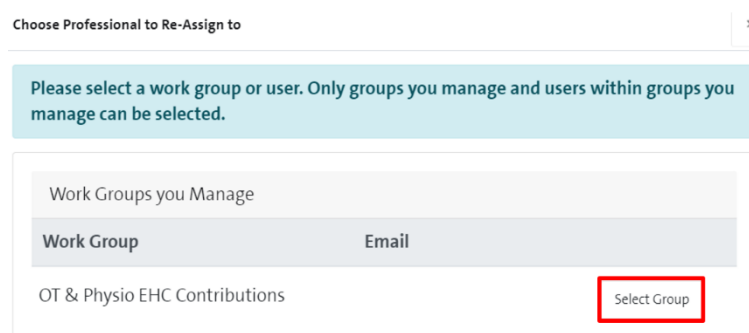
Once the form is ready to be submitted, you need to assign it back to the Group where Admin can pick it up and submit it:

1. Click **Reassign**:



Task List			
Form Type	Name	Due Date	Comments
1 EHC Needs Assessment Contributions	Billie Example	10-Nov-2021	Re-Assign

2. Click **Select Group** to reassign the form to the **OT & Physio EHC Contributions** group tray:



Choose Professional to Re-Assign to

Please select a work group or user. Only groups you manage and users within groups you manage can be selected.

Work Groups you Manage	
Work Group	Email
OT & Physio EHC Contributions	Select Group

Following this, Admin will pick up the form, download a copy for internal records, and submit the form to SEND.


Submitting the contribution to SEND and downloading a copy (Admin)

Once the contribution form has been completed by therapists and moderated by managers, the task will be assigned back to the group tray. Another email will be sent to the sirona.otpt-ehcp@nhs.net email address. From here Admin will need to pickup and submit the form to SEND and download a copy of the contribution for internal records:

1. Click **Pickup** to open the form:

Tasks Assigned to your Work Groups				
Work Group	Form Type	Name	Due Date	Comments
OT & Physio EHC Contributions	EHC Needs Assessment Contributions	Jimmy Example	15-Jun-2022	Pickup

2. Navigate to the second tab of the form and enter the date you are submitting it in the field provided:

Date contribution submitted to SEND: 

3. Once you are ready to send your form back to Bristol City Council, click **Submit Contribution**:

[Close](#)
[Save](#)
[Submit Contribution](#)

4. Click **Yes** on the pop-up (unless you do need to make further changes):

Submit Form

Have you entered all the information you need to?
You will not be able to make any further changes once you press the 'Submit' button.

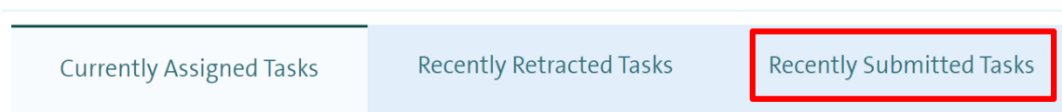
[Yes](#) [No](#)

Note: if you wish to PDF your form before submitting you can click the **PDF** button before submitting:

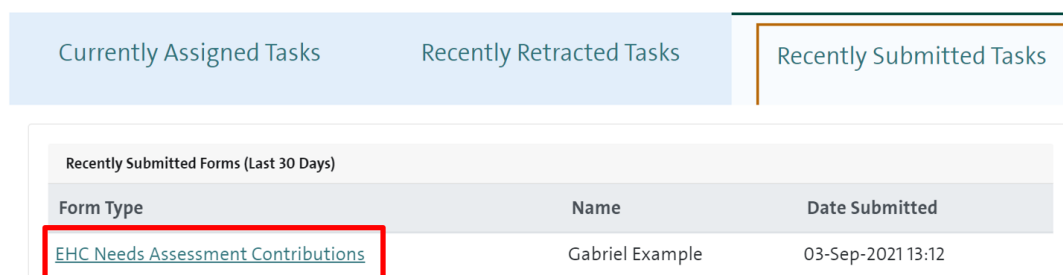
[Print](#)
[PDF](#)
[Close](#)

Alternatively, once you have submitted the form you will be able to access and download it for **30 days** after submission:

1. Navigate to the **Recently Submitted Tasks** tab:



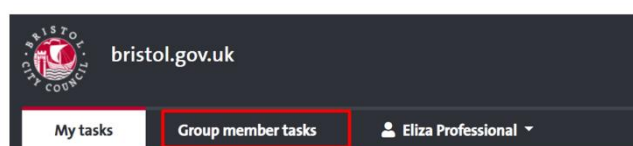
2. Click on the form you wish to view and it will automatically download:



Picking up and Reassigning forms between Therapists (Admin)

There may be scenarios where Admin need to reassign a contribution form from one therapist to another e.g. if the therapist is off sick/on leave, or they have asked you to assign the form to another colleague for completion. Please do not do this unless agreed by the therapist/manager so as not to cause confusion (as soon as you reassign the task it will be removed from their list of tasks).

If you need to pick up and/or reassign a task that is currently assigned to another individual in your group, navigate to **Group member tasks**:



Professional Portal - tasks to complet

Here you can **Re-Assign** the form either to yourself, another individual in the group or a work group:

Professional Portal - tasks assigned to others in your group

Tasks Picked-up from Work Groups you Manage				
Professional	Form Type	Name	Due Date	Comments
George Professional	EHC Needs Assessment Contributions	Jimmy Example	15-Jun-2022	Re-Assign

An email will be sent to the therapist to notify them that there is a form for them to complete.