



IDP online

A digital online system to support
Individual Development Plans
Personal Education Plans
Medical Plans

Version 15/09/2021

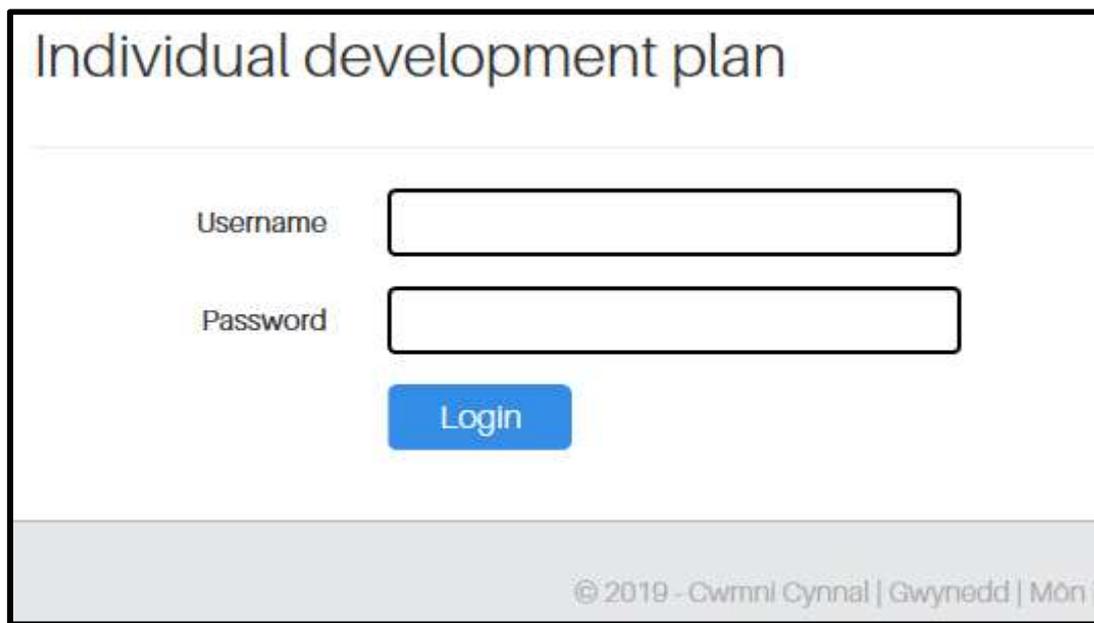


IDP online Guidelines

Main Page – Dashboard	4
Options on the page header	4
Keeping track of changes - Notifications	5
Pupils Page.....	6
Search for a Pupil.....	7
Filtering Options	7
Profile, IDP and PEP Page	8
Upload a Photo of a Pupil.....	9
Choose an Everyday Name.....	9
Change Review Date	9
Option Buttons on the Left Hand Panel	9
Example Text Box and Formatting	10
Personal Details Page - IDP and CAP	11
Profile / IDP / Medical Plan Information	12
Current IDP statuses and Admin statuses.....	12
IDP Status and Medical Plans	12
Admin Status	13
Submitting a Request / Review to the Authority	13
Left Panel – IDP Information Options	14
PEP Information.....	15
Current PEP status and Admin status of the PEP	15
Admin Status PEP	15
Left Panel – PEP Information Options.....	16
Invitations.....	17
Invite Contributors	17
Restricting Access.....	19
Schedule	20
Access for users of other settings	21
Reviewing Invitations	22
Creating and Managing Accounts	23
Data Protection and GDPR.....	24
Clusters of two or more settings.....	25
Printing.....	26

Log on to the System

<https://cduarlein.cymru>



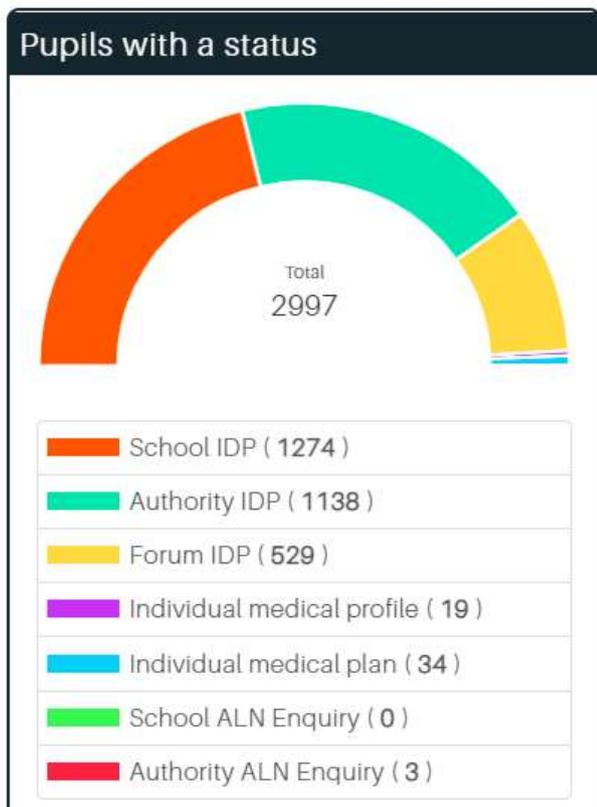
The screenshot shows a web page titled "Individual development plan". Below the title, there are two input fields: "Username" and "Password". A blue "Login" button is positioned below the password field. At the bottom right of the page, there is a copyright notice: "© 2019 - Gwmni Cynnal | Gwynedd | Môn |".

User names and password details will need to be obtained from the local authority or the educational setting to log onto the system.

Main Page – Dashboard

Choose either the IDP dashboard (Individual Development Plans and Medical Plans) or PEP dashboard (Personal Education Plans)

IDP PEP



Options on the page header



IDP	Link to the Dashboard
DASHBOARD	Link to the Dashboard
PUPILS	Link to the Pupils page
REPORTS	Link to the Reports page
CYMRAEG	Change interface language to Welsh
ADMIN	Link to the Users page
USERNAME	Account Management / Change Password
	Notifications from the system
	Exit the system

Keeping track of changes - Notifications

At the top of the dashboard is a blue bell, with the number of unread notifications with a red coloured background.



By selecting the white bell from the the options at the top of the system, or clicking the blue bell from the dashboard the Notifications page will appear:

Notifications

Search Start date End date

Page

Save Publish IDP Status Admin status Invites Change request

1 2 3 >

To filter the visible notifications it is possible to select the notification types by ticking or unchecking the types, entering a date period, and/or searching for names.

The filtered notifications will appear as a list in a table on the page

Pupils Page

- **Note:** The pupils that appear below are fictitious.

Pupils

[Profile/IDP](#) [PEP](#) [All pupils](#) [Archive](#) [Other locations](#)

[Show more data](#)

Search

With IDP

Status

Admin status

LAC

Next review

Showing 1 to 9 of 9 pupils

[Previous](#) [1](#) [Next](#)

IDP	Full name	Yr	DOB	Educational establishments	Next review	Status	Admin status	
4	ADAM Jackson	12	03/03/03	Addysg ddewisol gartref (Gwynedd)	26/05/21	Individual medical plan	No status	IDP 
10	ALLEN Philp	12	02/06/03	Addysg ddewisol gartref (Gwynedd)	08/06/22	Individual medical plan	No status	IDP 
3	ANITA Thomas	11	14/09/03	Addysg ddewisol gartref (Gwynedd)		One page profile		Profile 
5	ARTHUR Douthwaite	7	23/04/08	Addysg ddewisol gartref (Gwynedd)	19/05/22	Individual medical plan	No status	IDP 
6	BOBBY Cockerton	3	04/03/12	Addysg ddewisol gartref (Gwynedd)	25/05/22	School IDP	No status	IDP PEP 
8	CARLOS Price	2	05/03/13	Addysg ddewisol gartref (Gwynedd)	19/05/22	School IDP	No status	IDP PEP 
11	DANIEL Elliott	11	13/11/03	Addysg ddewisol gartref (Gwynedd)	08/06/22	Individual medical profile	No status	IDP 

Pupils with a Profile or IDP show by default. Select [PEP](#) to view Looked After Children, select [All Pupils](#) to view all pupils in the setting, [Archive](#) to see leavers, [Other locations](#) to view pupils of other settings open to the user's location.

[Profile/IDP](#) [PEP](#) [All pupils](#) [Archive](#) [Other locations](#)

[Show more data](#)

Selecting [Show more data](#) will display more data columns

Search for a Pupil

Search for a pupil by entering a name in the search box:

 Search

Filtering Options

There are 5 drop down search filters available

 Search <input type="text"/>	 With IDP All pupils 	 IDP Status All pupils 
 Admin status All pupils 	 LAC All pupils 	 Next review All pupils 

Other options on the Pupils page

Create profile

Create a One Page Profile for a pupil, first step to create either an IDP or PEP.



See pupil details



See the pupil's IDP

Create PEP

Create a pupil's PEP (once the Create Profile step has been taken)



View pupil's PEP

Profile, IDP and PEP Page

Select to view either IDP plans (Profile, IDP or Medical Plans) or PEP if they are available

MODULES | IDP | PEP

ERIC
(ERIC Sousa)
Addysg Ddewisol Gartref
Date of birth: 06/09/2002
Next review: 05/05/2022

Admin status:
No status

Status: School IDP

Home, Print, Refresh, Share, Publish

Profile

08/07/21 16:37 Save

What's important to ERIC

PEP IDP

Rich text editor with toolbar (A, A, Formats, B, I, list icon)

MODULES | IDP | PEP

ERIC
(ERIC Sousa)
Addysg Ddewisol Gartref
Date of birth: 06/09/2002
Next review: 15/10/2021

Admin status:
Check - Authority

Status: PEP

Home, Print, Refresh, Share, Publish

Profile

08/07/21 16:37 Save

What's important to ERIC

PEP IDP

What's important to ERIC? (Including hobbies and interests)

Rich text editor with toolbar (A, A, Formats, B, I, list icon)

Collapse or Expand the Left Panel

Collapse or Expand the Left Panel to make the right hand panel wider



Upload a Photo of a Pupil

Click inside the circle to upload a new picture or change the current picture

Choose an Everyday Name

Click on the first name to change to one of choice (a name that the pupil likes to be know from day to day). The full name in the brackets reaches the IDP System from the school's SIMS.

Change Review Date

A default date will be one year from the date of creation of the IDP. Click on this date to change.

Option Buttons on the Left Hand Panel



See / Print Pupil's One Page Profile or IDP



View previous published versions of the IDP / PEP



Extend invitation to contribute to the IDP / PEP

Publish

Create/save a snap-shot version of the IDP / PEP for record keeping or statutory requirements

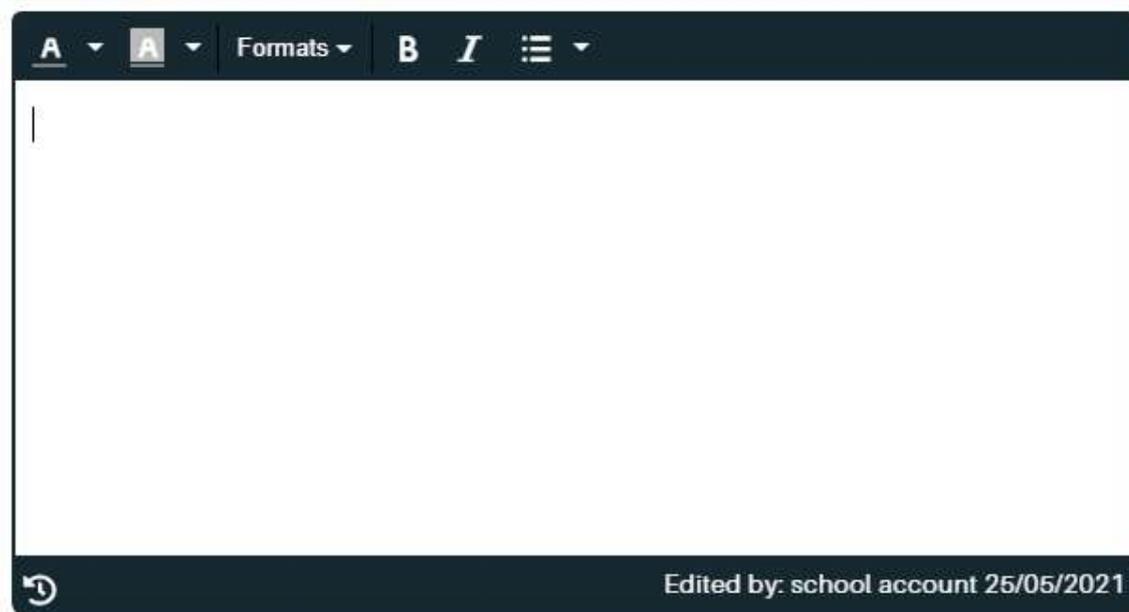
Schedule

Record administrative / statutory information for the IDP / PEP

Example Text Box and Formatting

What's important to ERIC

PEP **IDP** What's Important to ERIC? (Including hobbies and interests)



The screenshot shows a text editor interface. At the top, there are two icons: a green 'PEP' icon and a blue 'IDP' icon, followed by the text 'What's Important to ERIC? (Including hobbies and interests)'. Below this is a dark grey toolbar with the following elements from left to right: a font color selector (showing 'A'), a background color selector (showing 'A'), a 'Formats' dropdown menu, a bold 'B' icon, an italic 'I' icon, and a list/bulleted list icon. The main area is a large white text box with a vertical cursor at the top left. At the bottom of the text box, there is a dark grey bar containing a circular arrow icon on the left and the text 'Edited by: school account 25/05/2021' on the right.

When the **CAP** **CDU** icons appear above a data item this means that the information entered will be visible in the IDP and PEP. If only one icon is visible this means that the information entered will be visible in either the IDP or PEP depending on icon that appears.

Change text format



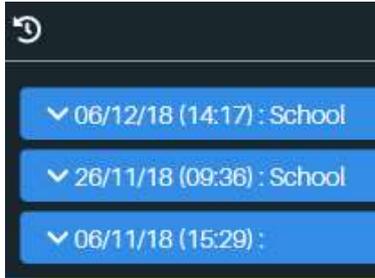
The screenshot shows a dark grey toolbar with the following elements from left to right: a font color selector (showing 'A'), a background color selector (showing 'A'), a smiley face icon, a 'Formats' dropdown menu, a bold 'B' icon, an italic 'I' icon, and a list/bulleted list icon.

Save changed text

Save

View previous versions of the text in the sub-panel





Text last updated by

Edited by: school school 03/07/2019

Personal Details Page - IDP and CAP

The Personal Details page shows the information that has transferred to the IDP Online system from the Educational Settings or Authority.

When working on the IDP the following options will appear:



When working on the PEP the following options will appear:



Educational Establishments: Educational settings history that have transferred to the system.

Parents / Guardians : Place to gather details of people involved in the IDP or PEP (eg parents, foster parents, guardians, social workers etc.)

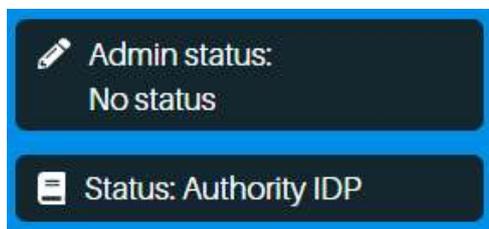
IDP : Biographical / additional information required to support the IDP plan (Profile, IDP or Medical Plan)

PEP : Biographical / additional information required to support the PEP

Profile / IDP / Medical Plan Information

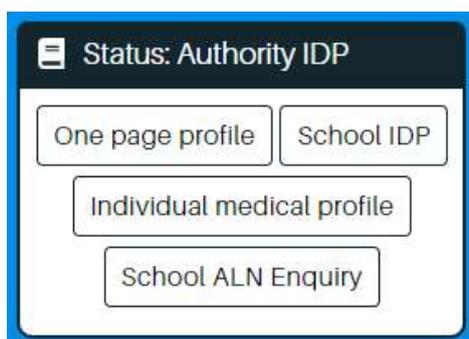
Top left panel showing pupil details and IDP status:

Current IDP statuses and Admin statuses



IDP Status and Medical Plans

Select current IDP status to show options for changing the status.



Options for Coordinators / School Staff

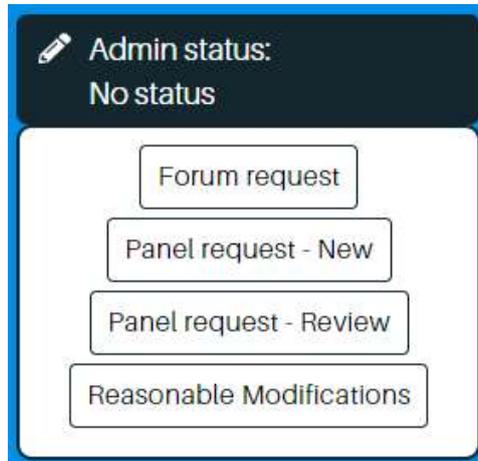
- One page Profile :
- Individual Medical Profile
- School IDP
- School ALN Enquiry

Other statuses available to the Authority

- Authority IDP
- Forum IDP
- Individual Medical Plan
- Authority ALN Enquiry
- Authority ALN Enquiry (Early Years)
- No Status

Admin Status

Options for Coordinators / School Staff



Forum request : Request to the ALN&I Forum

Panel request – New : New request to the Mediation Panel

Panel request – New (Early Years) : New request to the Mediation Panel

Panel request – Review : Review request to the Mediation Panel

Reasonable Modifications : Request to the Reasonable Modifications Panel

Other options available to the Authority

Tribunal – Appeal period

Tribunal – Compliance period

No status

Submitting a Request / Review to the Authority

Once a pupil's IDP is ready to submit to the Authority then either change the status to **Forum Request**, **Panel Request - Review** or **Panel Request - New** as appropriate.

Left Panel – IDP Information Options

Once the IDP status is changed to 'School' the IDP information options shown below will appear.

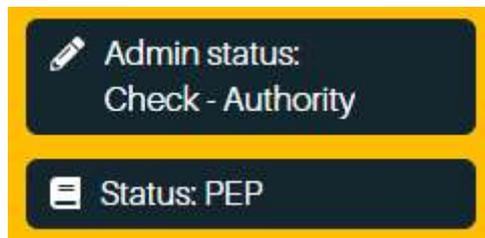
IDP
Profile
Personal details
Areas of need
Attainment
Working / not working for GWYNEDD?
Working / not working for the school?
Working / not working for the family?
Working / not working for others?
Aspirations
Who's Important to GWYNEDD?
Additional learning provisions (ALP)
Plans and reports
Information used to develop the IDP
Timeline of key events
Transition
Current Provision Summary
Signatures
Meetings
Transport
Reasonable Modifications
Medical
Decisions
Place at named school/other Institution or board and lodging

Medical Plan
Profile
Personal details
Areas of need
Working / not working for A
Working / not working for the family?
Working / not working for others?
Who's Important to Alys?
Plans and reports
Transition
Signatures
Meetings
Transport
Reasonable Modifications
Medical
Decisions

PEP Information

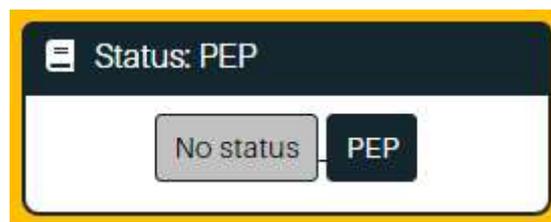
Top left panel showing pupil details and PEP status:

Current PEP status and Admin status of the PEP



PEP Status

Change PEP status buttons. Black button shows current status



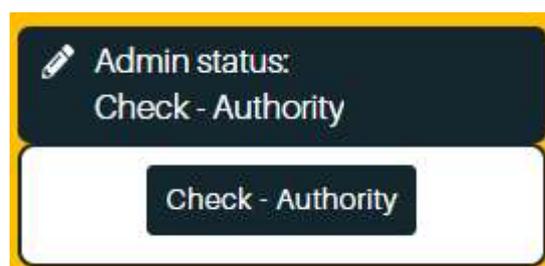
One option for Coordinators / School Staff

- PEP Completed PEP status

Option available to the Authority

- No Status : PEP no longer necessary

Admin Status PEP



One option for Coordinators / School Staff

Check - Authority : Request to the Authority LAC Coordinator to verify the PEP

Option available to the Authority

Check - School : Request to the School LAC Coordinator to verify the PEP

Left Panel – PEP Information Options

Once a PEP is started the lower left panel will show a selection of PEP information pages:



Invitations

It is possible to provide and block access to a 1PP / IDP on the [Invitations](#) page by clicking on the appropriate button on the left panel.



It is also possible to provide access to users of other settings (e.g. another school) as a group rather than as individuals. This is useful where a primary school coordinator needs to provide access for a secondary school co-ordinator and staff for example.

Invite Contributors

 IDP Access

Invites

[+ Create new Invite](#)

Create an invitation by selecting the [Create new invite](#) button and complete the 3 fields:

IDP Permissions

PEP Permissions

Select invitation level from IDP Permissions and PEP Permissions as required. Pages and sub-panels will be open for contributions depending on the level of invitation

Invitation levels:

- School
- Parent
- Others (i.e. professional contributors)
- Pupil
- Read only
- Lock out

Open invitations will appear in the [Pending Invites](#) sub-panel, e.g.

Pending invites

Email	Notes	Sent	Type	Code	
gwyncdu@gmail.com	Swyddog newydd	17/08/2020 12:24:51	Others		Update Cancel Re-send

The invited person will receive an email with a link and instructions to contact the school to receive an access code.

Selecting the  icon will display the access code:

It is possible to ammend and [Update](#), [Cancel](#) or [Re-send](#) an invitation:

[Update](#) | [Cancel](#) | [Re-send](#)

Invitations that have been accepted will appear in the [Accepted invites](#) sub-panel received:

Accepted invites

Email	Name	Notes	Type	
-------	------	-------	------	--

Restricting Access

The Invitation panel includes a sub-panel for blocking access

Block access to the IDP

+ Block access

	Username	Created	Removed	
✓	gwyncdu@gmail.com	17/08/2020 12:41:16		Delete

It is possible to remove a block by selecting [Delete](#). The plans will be open to the user again as long as their invitation is still accepted

Schedule

Administrative and statutory information can be entered on the [Schedule](#) page by selecting the button on the left hand panel.



Selecting one of the schedules from the drop-down list and pressing [Add](#) will allow schedule information to be recorded. It is possible to open more than one schedule at a time.



Closed schedules will appear on the [Historical](#) tab.

Access for users of other settings

The [Invitations](#) panel includes a sub-panel for providing access for users of other settings on the system (e.g. schools).

Access for other educational settings

[+ Add establishment](#)

	System/School	Created	Removed	
✓	Addysg Gartref Ynys Môn	26/01/2021 14:07:15		Delete

It is possible to create access to a 1PP/IDP by selecting the [Add location](#) button and then selecting the location from the drop down list and by selecting [Add](#). The location will appear in the table as above.

IDP Access

Addysg ddewisol gartref (Môn)

[Add](#)

[Close](#)

All staff with full accounts (not invitations) at the new location will see the pupils that they have been granted access to by selecting the [Other locations](#) tab on their [Pupils](#) page.

 Pupils

[Profile/IDP](#)

[All pupils](#)

[Archive](#)

[Other locations](#)

There will not be a need to provide an access code as only users of locations already identified on the system will see the 1PP/IDP

Reviewing Invitations

As part of planning for reviewing an 1PP/IDP and sending invitations to the review meeting, the educational setting must review the invitations of individuals, other agencies and professionals to ensure that they continue to be relevant to the child/young person, and that their contact details are correct: The educational setting must:

- add any new relevant invitations
- remove invitations for individuals that are no longer involved with the child/young person

Note. If a user who needs to be delete has received a number of invitations and it is not easy to find every 1PP/IDP that the user has been invited to then contact the authority to assist.

Contact Gwyn Jones. E-mail: gwynjones2@gwynedd.llyw.cymru or the Additional Learning Needs & Inclusion administrative team on gweinyddolADYaCH@gwynedd.llyw.cymru

Creating and Managing Accounts

Users with Administrator level accounts are responsible for creating new accounts for a location, and also deleting them when necessary.

The [Users](#) page appears by selecting **ADMIN** at the top of the page. All the current user accounts for the location will be displayed.

Users

[Create new account](#)

1 2/0

Invite	Username	Full name	School name
--------	----------	-----------	-------------

Select [Create New Account](#) to go to the new user registration page and enter the following information:

Register.

[Create new account](#)

Group	<input type="text"/>
Username	<input type="text"/>
Email	<input type="text"/>
First name	<input type="text"/>
Surname	<input type="text"/>
Phone number	<input type="text"/>
Password	<input type="text"/>
Confirm password	<input type="text"/>

The new account will appear in the user list

Group	Username	Full name	Educational placement	
Subregion Admin	gwynjones2@gwynedd.llyw.cymru	Gwyn Jones	Awdurdod Môn	Edit Delete

It is possible to change the password by selecting [Edit](#). And delete an account from the system by selecting [Delete](#)

Data Protection and GDPR

Educational settings must have controls in place to ensure the confidentiality, integrity and availability of the data they Process in order for them to comply with their Data Protection policy and GDPR regulations. The level of access granted for each user should be retained and reviewed as part of 'new starter/change of role/leaver' records allowing access to be correctly updated when required.

Clusters of two or more settings

Are you the head or ALN co-ordinator for more than one school? It is now possible to create a cluster of two or more schools - with one account to log into the IDP online system to view the pupils of the whole cluster.

Authority staff will be responsible for creating clusters. To set up a cluster account contact Gwyn Jones. E-mail: gwynjones2@gwynedd.llyw.cymru or the Additional Learning Needs & Inclusion administrative team on gweinyddolADYaCH@gwynedd.llyw.cymru

Printing

It is possible to print individual reports with a pupil's information by selecting the print button on the left panel and selecting one of the reports that appear



Reports

IDP (Welsh) The complete IDP in Welsh.
IDP (English) The complete IDP in English
One page profile One page profile of the student
Reasonable modifications Reasonable modifications report (Including pupil details)
ReasonableModificationsEn Reasonable modifications report (Including pupil details)

Once the report loads on screen it is possible to select a format:



And opt to print or download the report:

Note. Selecting to download the report does not always create a successful PDF document that will open successfully in a package such as Adobe Reader (research to solve the problem is ongoing).

Creating a PDF document by printing and selecting 'Microsoft Print to PDF' or similar as the printer creates an accurate PDF document at all times.

