



# **ASSET for Schools ePEP - Electronic Personal Education Plan Key Clarifications, Capabilities & Compliance Summary**

**Secure, Accredited, GDPR Compliant  
Award-Winning Software**



Crown  
Commercial  
Service  
Supplier



## Our System – Key Clarifications, Capabilities & Compliance Summary

This service is one of several modules available within the **ASSET for Schools** platform. Each module—such as the *Electronic Personal Education Plan (ePEP)* and the *Attendance, Progress and Attainment Monitoring Service* (G-Cloud Service IDs 946153222438129 and 686667836150669)—can be purchased and used independently or together under separate G-Cloud 14 call-offs.

When more than one module is procured, they operate within the same secure cloud environment, sharing common data structures, user management, and reporting tools. Each module is activated in line with the customer's chosen contract and pricing, ensuring full compliance with Crown Commercial Service (CCS) framework rules.

All modules use the same infrastructure, security standards, and support arrangements. No external integration, additional purchase, or system development is required to enable joint use.

**ASSET for Schools – ePEP** is a secure, modular, cloud-based platform purpose-built for managing and monitoring Personal Education Plans. It brings together all key stakeholders—schools, social workers, carers, and Virtual School staff—into a single system that ensures visibility, compliance, and collaboration around each child’s educational journey.

**PEP Lifecycle Management:** ASSET handles the full cycle of a PEP—from initiation and review to closure—ensuring timely updates, SMART target tracking, and evidence capture throughout.

**Voice of the Child:** The platform offers dedicated child-friendly sections with secure access for children and young people to express their views, aspirations, and concerns directly into their PEPs.

**Progress and Attainment Tracking:** Integrated tools allow for recording, analysing, and reporting on attainment over time, identifying learning gaps and measuring progress against age-related expectations or custom benchmarks.

**Timeliness and Review Alerts:** Automated notifications ensure PEPs are reviewed within statutory timelines, with real-time dashboards flagging overdue or upcoming reviews.

**Safeguarding and Risk Monitoring:** The system highlights attendance concerns, risk indicators, and escalations. It supports structured workflows and secure sharing of sensitive safeguarding data.

**Integrated Communication Tools:** ASSET enables in-system commenting, messaging, and collaborative plan updates. All stakeholders can interact in real time with role-based visibility.

**Custom Reporting and Dashboards:** Local authorities can generate live data reports on compliance, quality, completion timeliness, attainment, and cohort-level analytics—all exportable in DfE and open formats.

**Configurable Forms and Workflows:** Templates, pathways, and permissions can be tailored to reflect local priorities, VESO standards, and multi-agency practices.

**Accessibility and Assistive Tech Compatibility:** Fully WCAG-compliant and tested with common assistive technologies, ensuring inclusive access for all users.

**Integration with Local Systems:** ASSET supports SSO and integrates with Liquid Logic, CPOMS, CP-IS, NHS records, and other third-party systems to maintain continuity and avoid duplication.

**Secure Document and Media Uploads:** Supports uploads of reports, letters, media (audio/video), and scanned documentation with encryption and version tracking.

**Ofsted and Audit Readiness:** Every action is logged, with a complete audit trail for reviews, edits, communications, and uploads—meeting inspection and compliance needs.

ASSET for Schools – ePEP is fully compliant with GDPR, ISO 27001, and Crown Commercial Service (CCS) G-Cloud 14 framework standards. It can be deployed as a standalone product or alongside the Attendance Collection module for integrated oversight of education, engagement, and progress.

## A. Core Platform Overview

- Supplier: Stat Solutions Ltd
- Platform: ASSET for Schools
- Framework: G-Cloud 14 (Lot 2 – Cloud Software)
- Modules available:
  - Electronic Personal Education Plan (ePEP) – G-Cloud Service ID 946153222438129
  - Attendance, Progress & Attainment Monitoring – G-Cloud Service ID 686667836150669
- Each module can be purchased independently or combined under separate G-Cloud call-offs.
- All modules operate within one secure cloud platform, sharing data, governance, and reporting tools.
- ASSET for Schools operates as a SaaS (Software as a Service) cloud-based application hosted on UK sovereign Azure data centres.
- Designed for Virtual Schools, Local Authorities, and education professionals supporting Looked-After Children, Post-16 learners, and Children with a Social Worker.
- This service is delivered entirely through the G-Cloud framework with no additional procurement required.
- Proven solution already adopted by multiple UK Local Authorities and Virtual Schools, supporting statutory returns, inspection readiness, and continuous improvement.
- Recognised for improving PEP quality, data consistency, and performance outcomes during Ofsted inspections.

ASSET for Schools – ePEP is a secure, cloud-based platform designed to streamline and enhance the Personal Education Plan process for children and young people under local authority care. The solution supports multi-agency collaboration, statutory compliance, education outcome focus and data integrity across the entire PEP lifecycle.

The system aligns with the Children Act 1989, Care Planning Regulations,

Virtual School Head guidance and the local authority's education and care strategy. Whether used independently or alongside attendance and attainment modules, the platform ensures consistent workflow, auditability and accessibility for all stakeholders.

## B. Key Features & Core Capabilities

### **Collaboration & Multi-Agency Integration**

The platform enables designated teachers, social workers, carers, health professionals and the child/young person to work on a unified digital PEP. Real-time co-editing, notifications, role-based views and document sharing facilitate transparent planning and review.

### **Customisable Templates & Workflows**

Each PEP uses templates adaptable by phase (EYFS, primary, secondary, post-16), placement type, or local process. Workflows can be configured for review cycles, sign-off routing and escalation steps.

### **Child Centric Design**

A dedicated child access portal enables children/young people to contribute their views, record aspirations, upload media (audio, video, drawing) and review their targets. The platform supports accessibility adjustments and ensures voice is embedded in planning.

### **Progress Monitoring & Target Setting**

SMART target management, achievement tracking and intervention logs are built into the PEP process. Production and review of targets are linked directly to attainment and progress data.

### **Safeguarding and Placement Oversight**

Placement information, chronology of events, risk tracking and safeguarding flags are integrated into each PEP record. Escalation and alert workflows ensure that welfare concerns are visible, actionable and auditable.

### **Reporting & Compliance**

Live dashboards show completion status, timeliness, attendance, attainment and voice of the child metrics by cohort, school, team or placement. Exportable reports support statutory returns (such as

SSDA903), local governance oversight and inspection readiness.

### **Data Security & Governance**

Hosted on UK-based ISO 27001-certified infrastructure, the system uses encryption at rest and in transit, multi-factor authentication and full audit logging. Role-based controls, data retention policies and exit data export protocols support compliance and continuity.

## **C. Data Ownership, Hosting & Security**

ASSET for Schools ensures full compliance with UK GDPR, Data Protection Act 2018, and local information governance requirements. The council retains full data ownership at all times.

### **Hosting & Infrastructure**

- Data is hosted in ISO 27001, ISO 9001 and Cyber Essentials Plus certified UK data centres.
- ASSET infrastructure is built on a secure, scalable cloud platform with automatic failover and high availability.
- Daily backups are retained with a 30-day restore window.

### **Security Protocols**

- All data is encrypted at rest and in transit using AES-256 and TLS 1.2 or higher.
- Multi-Factor Authentication (MFA) is enforced for all administrative and professional access.
- Penetration testing and vulnerability assessments are conducted regularly by CREST-accredited partners.

### **Data Governance**

- Full audit trails track every user interaction, change, and system-generated alert.
- Configurable data retention policies enable the council to define archival and deletion rules per record type.

- ASSET supports structured data export in open formats (CSV, JSON, XML) for portability and re-procurement alignment.

## D. Access, Roles & Permissions

Access to the ASSET ePEP platform is governed by finely layered role-based controls, ensuring that users only see and interact with data appropriate to their professional responsibility.

### Role Configuration

- Standard roles include Designated Teacher, Social Worker, Virtual School Officer, Independent Reviewing Officer, SENCO, Health Professional, and Young Person.
- Each role has configurable permissions defining access to view, edit, comment, approve, or sign off sections.
- Local administrators can create custom roles and permission profiles aligned with specific council team structures.

### Third-Party & Multi-Agency Access

- The system supports external access for non-LA professionals (e.g. NHS, educational psychologists) via secure authentication and restricted views.
- Secure invite mechanisms allow time-limited access for professionals involved in specific reviews or interventions.

### Audit and Monitoring

- All access is logged with timestamps, device metadata, and user identification.
- Reports can be generated showing user activity by case, cohort, or role for governance and audit purposes.



## **Single Sign-On (SSO) Integration**

- ASSET supports integration with council identity providers using SAML 2.0 or Azure AD for seamless authentication.

## **User Support**

- Admins can manage user credentials, reset access, and apply lockdown procedures in the event of a breach or role change.

## **E. PEP Completion Timeliness Monitoring**

ASSET for Schools automates the entire PEP lifecycle—from initiation through review and sign-off—ensuring that statutory timelines are met and exceeded. The system proactively supports Virtual School teams to track, escalate, and resolve overdue actions.

### **Lifecycle Automation**

- New PEP cycles are generated automatically based on the child's placement status and last review date.
- Key milestones (initiation, mid-point review, sign-off) are timestamped and displayed in an interactive timeline view.

### **Real-Time Dashboards**

- Custom dashboards show current PEP status across all children, including:
  - Initiated but not completed
  - Completed but not reviewed
  - Overdue by set thresholds (e.g. 7, 14, 28 days)
- Dashboards are filterable by school, worker, borough, or PEP stage.

### **Automated Alerts & Escalation**

- System-generated reminders are sent to responsible parties as deadlines approach or are missed.

- Escalation rules notify line managers or Virtual School heads when a PEP remains incomplete after a defined period.

## **Performance Reporting**

- Cohort-level reports measure PEP timeliness, identify bottlenecks, and support strategic improvement.
- Overdue trends and compliance percentages are exportable for governance review and Ofsted preparation.

## **F. Safeguarding & Risk Flags**

Safeguarding is embedded throughout ASSET for Schools. The system helps surface risk indicators early and ensures that safeguarding concerns are triaged, recorded, and escalated in line with statutory frameworks.

### **Integrated Safeguarding Framework**

- Safeguarding concerns can be flagged at any stage of the ePEP and are recorded against:

Placement stability

- School experience
- Emotional and physical wellbeing
- Social behaviour and relationships

### **Triage and Notification**

- Concerns flagged by any user trigger:
  - Immediate notification to Designated Safeguarding Leads (DSLs)
  - Alerts to the Virtual School and Social Worker
  - Secure locking of sensitive fields from non-safeguarding staff

## **Safeguarding Dashboard**

- Live view of flagged records across the authority
- Risk indicators categorised by severity and time since last review
- Filters for children with repeat incidents, unreviewed flags, or contextual safeguarding risks

## **Contextual Safeguarding**

- Risk entries can be tagged with location, setting, or peer group indicators
- Enables mapping of recurring hotspots or patterns across schools and placements

## **Audit and Reporting**

- All safeguarding actions are logged with contributor ID, timestamp, and action taken
- Reports show risk trends across time, geography, and demographic groups

## **G. PEP Panel Participation**

ASSET for Schools incorporates workflow capabilities designed to support structured participation from PEP Panel members and senior oversight groups. This ensures that multi-agency review, escalation, and validation processes are traceable and consistent with the council's governance standards.

### **Panel-Linked Workflow Integration**

- Configurable PEP workflows enable designated stages for panel discussion, review, or approval.
- Panel input can be mandated for specific cases (e.g. out-of-county placements, repeated exclusions, high-risk learners).

## **Secure Participation & Commenting**

- Panel members access PEPs through role-restricted logins with read-only or approval-based permissions.
- Comments are timestamped, linked to role, and visible in the panel review history.

## **Auditable Escalation Path**

- The system captures:
  - Whether a PEP was reviewed by panel
  - Any conditional approvals or deferrals
  - Key concerns or requested amendments
- Audit logs allow retrospective validation of decisions.

## **Governance & Workflow Dashboards**

- Visual dashboards highlight:
  - PEPs awaiting panel input
  - Delays in sign-off due to pending decisions
  - Panel workload across terms

## **Custom Reporting**

- Reports available to senior leaders show engagement trends, rejected vs. approved plans, and common themes raised at panel level—supporting governance oversight and targeted improvement.

## H. Voice of the Child Participation

ASSET for Schools embeds the Voice of the Child (VoC) into every layer of the PEP process, ensuring young people are not just consulted but actively involved. The system provides a dedicated and secure environment for children to express themselves meaningfully and on their own terms.

### **Child-Centred Design**

- The VoC section is age-appropriate, visually accessible, and supports independent or assisted completion.
- Content covers school experience, friendships, aspirations, emotional safety, and placement wellbeing.

### **Multiple Input Modes**

- Young people can contribute using:
  - Typed entries
  - Audio messages (MP3)
  - Video uploads
  - Drawings or photographs

### **Customised Access**

- Children access their VoC portal through a secure child-specific interface.
- Permissions ensure that only authorised professionals can view or edit this section.

### **Safeguarding Triggers**

- The system flags entries with indicators such as fear, bullying, or unhappiness.
- Alerts are routed to safeguarding staff, with VoC entries locked from casual viewers to preserve privacy.

## **Integration Into Planning**

- VoC entries are auto-linked to relevant sections of the PEP summary and target setting.
- Changes in the child's views trigger review notes and reminders to practitioners to acknowledge updates.

## **Historic Traceability**

- All entries are date-stamped, version-controlled, and attributed to contributor type (child, assisted, adult).
- Longitudinal views show how a child's perspective changes over time—supporting evidence for review meetings, inspections, or intervention planning.

## **Inclusive by Design**

- WCAG 2.1 AA compliance
- Support for screen readers, simplified modes, and visual cues for children with SEND or communication barriers
- Trauma-informed UX minimises repetitive questioning and allows respectful pre-fill of previous answers

## **I. SEND and EHCP Integration**

ASSET for Schools is designed to ensure that the needs of children and young people with Special Educational Needs and Disabilities (SEND)—including those with Education, Health and Care Plans (EHCPs)—are fully incorporated into the Personal Education Plan (PEP) process.

### **EHCP Alignment and Visibility**

- A dedicated section within the ePEP allows professionals to record:
  - Date of EHCP issue
  - Lead Local Authority and case officer
  - Section-specific EHCP outcomes

- Outcomes from the EHCP are directly linked to the SMART targets within the PEP to create a unified planning framework.

## **SEND Profile Integration**

- Users can record detailed SEND data:
  - Primary and secondary needs
  - Type and level of support (e.g. 1:1 provision, therapies)
  - Categorisation by SEND Code of Practice areas
- This information is embedded throughout the PEP and reflected in progress reviews and interventions.

## **Synchronised Reviews and Monitoring**

- EHCP review dates are tracked within the ePEP timeline to align planning cycles and ensure joined-up working.
- Review notes, uploaded documents, and professional commentary are linked to each child's SEND status for comprehensive monitoring.

## **Secure Document Sharing and Permissions**

- EHCP documentation is stored within each child's ePEP record and made available to authorised users only.
- All files are encrypted and access-controlled in compliance with GDPR and information governance requirements.

## **Reporting and Cohort Insights**

- Reports filter by:
  - EHCP status
  - Primary SEND need
  - Outcomes met/unmet
  - Rate of academic progress by SEN type
- Data supports internal QA, DfE reporting, and Ofsted readiness.

## Accessibility Support

- SEND-specific UX options include:
  - High contrast mode
  - Text-to-speech support
  - Customisable layouts for ease of navigation by professionals and families
- Reasonable adjustments are recorded and applied across the interface.

This integration ensures SEND and EHCP objectives are embedded within every layer of PEP planning, enhancing collaboration between education, health, and care professionals.

## J. Transition Tracking

ASSET for Schools supports structured transition planning to prevent disruption during critical educational and care stage changes. Transition workflows and tracking tools are built into the ePEP to proactively manage movement across schools, placements, and key academic stages.

### Automated Transition Alerts

- Built-in logic identifies children approaching:
  - Nursery to Reception
  - Primary to Secondary (Year 6 to 7)
  - Post-16 to Post-18 or leaving care
- Configurable lead times notify Virtual Schools and social workers months in advance.

### Transition Planning Tools

- Dedicated sections within the PEP capture:
  - Planned destination
  - Contacts at receiving institution or service
  - Transition plans and agreed actions



- Responsibilities and deadlines are clearly assigned to professionals involved.

### **Monitoring Post-Transition**

- The system tracks:
  - Confirmation of enrolment
  - First attendance
  - Early warning signs of breakdown (e.g. absence, exclusion)
- A dedicated post-transition review log is embedded in the ePEP.

### **Secure Handover Features**

- Handover documentation and records of past PEPs are accessible to new professionals post-transfer.
- Access history and permissions are logged for GDPR compliance.

### **Support for Post-16 Planning**

- The PEP supports documentation of:
  - Careers advice
  - Apprenticeship and college applications
  - Risk of NEET and associated support planning
- For care leavers, extended PEP tracking aligns with Virtual School duties post-18.

### **Insight Reporting**

- Transition cohort reports identify:
  - Pupils without destinations
  - Incomplete transition plans
  - Placement changes within short intervals
- This helps the council prioritise support and resource allocation.

This transition module ensures movement between settings is planned, supported, and continuously reviewed—preventing instability and improving long-term outcomes.

## K. Reporting

ASSET for Schools features a robust reporting engine and real-time dashboards tailored for operational management, strategic planning, and statutory compliance. The system empowers Virtual Schools, social workers, and education teams to monitor performance, identify gaps, and evidence impact without reliance on manual processes.

### **Real-Time Dashboards**

- Visual overviews display live metrics for:
  - PEP review timeliness
  - Attendance trends
  - Academic progress
  - Safeguarding alerts
  - Voice of the Child engagement
- Dashboards are user-specific, ensuring tailored insights for each role.

### **Multi-Dimensional Filtering**

- Reports can be filtered by:
  - School or provision
  - Local authority
  - SEN/EHCP status
  - Gender, ethnicity, or age
  - Placement type or borough

### **Automated Compliance Monitoring**

- System generates audit-ready reports aligned with DfE SSDA903 requirements.
- Tracks:
  - PEP frequency and quality
  - Outcomes against targets
  - Engagement metrics
- Alert flags highlight overdue actions or missing reviews.

### **Progress & Trend Analysis**

- Tracks academic and wellbeing data across terms and key stages.
- Highlights progression, stagnation, or regression at the individual and cohort levels.
- Enables analysis by SEN status, Key Stage, or support type.

### **Scheduled Reporting**

- Reports can be auto-generated and sent to stakeholders weekly, monthly, or quarterly.
- Reduces manual effort and ensures timely oversight by leadership or inspection teams.

### **Export in Open Formats**

- Output formats include:
  - PDF (fixed layout)
  - Excel, CSV (editable)
  - XML, JSON (integration-ready)
- This supports data portability and aligns with CCS exit requirements.

### **Benchmarking & Cross-Authority Analysis**

- Virtual Schools can compare performance across:
  - Providers
  - Boroughs
  - Demographic groups
- Identifies best practice areas and outlier cases for intervention.

### **Inspection-Ready Outputs**

- Ofsted-focused templates include:
  - PEP timeliness compliance
  - Safeguarding response rates
  - Child voice participation
  - Academic attainment benchmarks

By embedding rich data visualisation and automation, ASSET ensures continuous quality improvement, accountability, and streamlined reporting for governance and inspections.

## L. Integration & Interoperability

ASSET for Schools is architected as an API-ready, modular platform that facilitates seamless integration with local authority systems, national services, and third-party tools—supporting data flow, interoperability, and joined-up working across agencies.

### **Core Platform Design**

- Modules (ePEP, Attendance, Analytics) operate within a single environment—eliminating data silos and duplication.
- Designed around a “single child record” concept to ensure a unified view of care, education, and support data.

### **Secure System Integration**

- Supports optional integration with:
  - Liquidlogic (via REST/SOAP APIs)
  - Capita One
  - Tribal Synergy
  - CPOMS
- Enables two-way data exchange including care status updates, EHCP alignment, and safeguarding records.

### **National Data Systems Compatibility**

- CP-IS (Child Protection - Information Sharing): Ready to support safeguarding queries and alerts.
- NHS Systems: Structured mapping supports medical or SEND health data exchange under data-sharing agreements.
- DfE Compliance: Fully aligned with SSDA903, Census, and other national datasets.

### **Real-Time API Sync**

- REST-based APIs support real-time and scheduled data exchange.
- Trigger-based updates ensure minimal lag between systems and avoid manual re-entry.
- Custom mapping options allow tailored fields for local authority-specific systems.

### **Sandbox & Validation Tools**

- Dedicated test environments allow:
  - UAT (User Acceptance Testing)
  - Secure interface testing
  - Onboarding of new integrations

### **Standards & Compliance**

- Supports exports in open formats: JSON, XML, CSV.
- Aligns with Crown Commercial Service re-procurement and exit standards.
- Built-in audit trails ensure traceability for data exchanges and user access.

### **Governance & Permissions**

- Role-based access control governs which users or systems can send/receive data.
- Every transaction is logged and can be traced to an individual system or user action.
- Complies with GDPR, Data Protection Act 2018, and local IG policies.

This interoperability framework allows ASSET to function both as a standalone platform and as an integrated hub within broader digital ecosystems—ensuring consistent, secure, and efficient data use across education, care, and health services.

## M. Data Sharing & Governance

ASSET for Schools is built to support responsible, compliant, and auditable data sharing across multi-agency settings, enabling collaborative education and care planning while safeguarding sensitive information.

### **Role-Based Data Access**

- Each user has access strictly based on their professional role and clearance level (e.g., social workers, Designated Teachers, Virtual School staff).
- Third-party professionals (e.g., health visitors, mentors) may be granted controlled access to specific children or sections under strict governance settings.
- Permissions are configurable and auditable by system administrators.

### **Audit Logs and Data Trails**

- Every action in the system is logged and time-stamped.
- A complete audit trail is maintained for:
  - Data access
  - Edits to plans or targets
  - Report exports
  - Review sign-offs
- This supports safeguarding investigations, Ofsted inspections, and GDPR compliance.

### **Compliance with IG Standards**

- Fully aligned with:
  - UK GDPR
  - Data Protection Act 2018
  - Local authority information governance frameworks
  - Crown Commercial Service guidelines

### **Secure File Exchange**

- Documents (e.g. EHCPs, transition plans, assessments) can be uploaded and shared securely.
- Access to attachments is permissions-based, with optional expiry or download restrictions.
- Document history is versioned and auditable.

### **Parental and Young Person Access**

- Access for parents/carers or young people is configurable.
- Views are filtered based on what is appropriate to the role and age of the user.
- Comments or uploads from these users are flagged and reviewed by professionals.

### **Exit and Data Portability**

- On service termination, data is exportable in non-proprietary formats (CSV, XML, JSON).
- Structured exports include full case histories, attachments, review notes, and audit logs.
- This aligns with CCS framework rules on exit and supplier transition.

ASSET enforces a strong governance model that balances security, transparency, and collaborative working, ensuring the right people see the right data—no more, no less.

## **N. Evidence-Based Practice & Planning**

ASSET embeds best-practice planning frameworks into the PEP lifecycle, enabling staff to produce plans that are not only statutory-compliant but also guided by methods proven to improve outcomes.

### **Built-in Frameworks and Templates**

- **Signs of Safety:** Templates include strengths/needs mapping, danger statements, safety goals, and scaling tools.
- **SMART Planning:** Each PEP supports SMART target setting, with prompts to encourage specific, measurable, achievable, relevant, and time-bound planning.
- **Outcomes Star:** Professionals can use this model to track development over time across wellbeing domains.
- Templates are customisable by local authority to match preferred

frameworks.

### **Longitudinal Tracking**

- Every plan update, review comment, or intervention note is versioned and timestamped.
- Practitioners can see:
  - Which actions led to progress
  - Which strategies were repeated or revised
  - How outcomes evolved across terms and placements
- Supports reflective supervision, case review, and leadership oversight.

### **Comparative Case Analysis**

- Virtual School Heads and managers can view trends across cohorts to identify:
  - Variability in planning quality
  - Best practice clusters
  - Areas where additional training or intervention is needed
- Cohort filters include SEN, placement type, Key Stage, UASC status, etc.

### **Visual Planning Tools**

- Dashboards include heatmaps and charts showing:
  - Completion vs. effectiveness of plans
  - Trends in unmet needs
  - Alignment between child voice, plan targets, and practitioner actions

### **Workflow Support**

- System reminders and logic prompts ensure plans are not static.
- Professionals are guided to:
  - Review outcomes against previous plans
  - Update targets with new information
  - Close or escalate unresolved actions

By integrating planning science directly into daily workflows, ASSET promotes not just accountability—but improved, evidence-driven outcomes for children and young people.



## O. Exit & Transition Planning

ASSET for Schools provides a structured and transparent exit plan that ensures full continuity, compliance, and operational stability in the event of service termination or supplier transition.

### **Documented Exit Roadmap**

- A formal Exit Plan is delivered within three months of contract start.
- The plan includes:
  - Data migration timelines
  - Responsible parties
  - Final service access dates
  - Knowledge handover protocols

### **Structured Data Exports**

- Full data exports are available in open formats (CSV, XML, JSON).
- Content includes:
  - Child records
  - PEP histories and targets
  - Attachments and voice inputs
  - Audit trails and user activity logs

### **Post-Contract Support**

- Up to 30 days of support post-exit is available to assist with issue resolution, data clarification, or incoming supplier coordination.

### **Data Retention & Deletion**

- Data is deleted in line with council policy upon written instruction, with full evidence of secure erasure.
- A deletion log is issued for records management and compliance.

### **Knowledge Transfer**

- Optional training sessions for successor staff
- Provision of data dictionaries and field mapping for easier re-integration

This approach ensures zero disruption for vulnerable learners and maintains the council's control and assurance during supplier transition.

## P. Governance Structure & Participation

ASSET promotes strong local governance by making participation clear, auditable, and consistent across all levels of PEP activity.

### **Role Mapping**

- Role profiles and permissions are mapped to professional responsibilities (e.g. DT, SW, IRO, Virtual School).
- Each action (approval, review, submission) is linked to a user and timestamped.

### **PEP Panel Support**

- Dedicated workflows enable formal PEP panel approvals or escalations.
- Panels can view consolidated cases, annotate plans, and request amendments before final sign-off.

### **Virtual School Oversight**

- System-wide dashboards allow Virtual School staff to:
  - View progress across schools and social care teams
  - Identify overdue or incomplete PEPs
  - Flag patterns of concern or non-compliance

### **Senior Management Reporting**

- Weekly or monthly reporting packs support director-level oversight.
- Governance metrics include PEP timeliness, safeguarding alerts, SEN progress, and UASC engagement.

### **Multi-Agency Visibility**

- Information sharing between professionals is controlled and auditable.
- Meetings and decisions are logged with who was involved and what was agreed.

This structured governance model reinforces local accountability and ensures robust tracking of who is responsible for every child's educational pathway.

## Q. Training & Support

ASSET ensures that every user—whether a seasoned Designated Teacher or a newly appointed social worker—has the tools and support to use the system effectively and confidently.

### **Onboarding & Induction**

- All users receive a guided onboarding process tailored to their role.
- Virtual sessions are offered pre-rollout and upon request.

### **Live Support & Helpdesk**

- Dedicated UK-based support team available during extended working hours.
- Priority channels for Virtual School teams and escalated safeguarding issues.

### **Training Documentation**

- User guides, walkthroughs, and training videos are available via an online resource hub.
- Guides are written in plain English, accessible formats, and tailored for different user groups.

### **Role-Based Training**

- Separate training for:
  - Designated Teachers
  - Social Workers
  - Foster carers and parents (where applicable)
  - System administrators

### **Ongoing CPD & Updates**

- Optional webinars cover new features and best practices.
- Update summaries are provided for every major platform release.

This ensures users stay confident and capable in using the platform—minimising errors, delays, and administrative overhead.

# One Stop Solution

Sophisticated termly reporting of **Progress & attainment**

Identifying patterns of **attendance** daily, weekly or as required.

Immediate notifications of **exclusions**

**PEP for Success**

**I**nformation **M**anagement **S**ystem

**A**dvanced **A**nalYTics



## Awards & Accreditations & Certifications



225 Marsh  
Wall Angel  
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