OXFORDSHIRE
COUNTY COUNCIL

EHCNA/P Liquidlogic Portals Guidance for Health Partners

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Introduction

During 2021 Oxfordshire County Council (OCC) tendered for a new, modern suite of integrated software to fulfil the Council's education case management requirements. This concluded with the contract being awarded to Liquidlogic who also supply the Council's Adults' and Children's Social Care systems.

The implementation of the new Liquidlogic systems will require a number of positive changes to working practice for all involved Council staff. There is also the opportunity to develop more seamless systems and processes with parents, carers, young people and families, school and academy settings, partners and providers.

The most important element of the new systems implementation that will affect Health partners is the new way of requesting and submitting health advice for the *Education and Health Care Needs Assessment / Plan (EHCNA/P)* process online via the Liquidlogic Delegation Portal.

In order to provide health advice within the 6-week statutory timeframe, Health partners will need to register and utilise the Liquidlogic Delegation Portal to securely and seamlessly submit reports as part of the EHC Needs Assessment stage.

This will involve a simple process to register for a new Portal account. Then, once verified, follow the steps to submit the relevant forms and communicate with Council staff quickly, easily and securely.

The aim of this guidance document is to help users navigate and complete the relevant tasks in the Liquidlogic Children's and Delegation Portals. The document includes a user guide, FAQ section and system support details.

System Requirements

In order to ensure that all the functionality of the new Portals works as intended and to keep your browsing experience as secure as possible, it is strongly recommended that you update your Internet browser to its latest version.

The Liquidlogic Portals are supported on the following browser platforms:

- Microsoft IE11
- Microsoft Edge
- Google Chrome
- Apple Safari
- Mozilla Firefox

Mobile device browsing is also supported. However, for the best user experience, it is recommended to access the Portals with one of the browsers listed above on a standard PC or Apple computer.
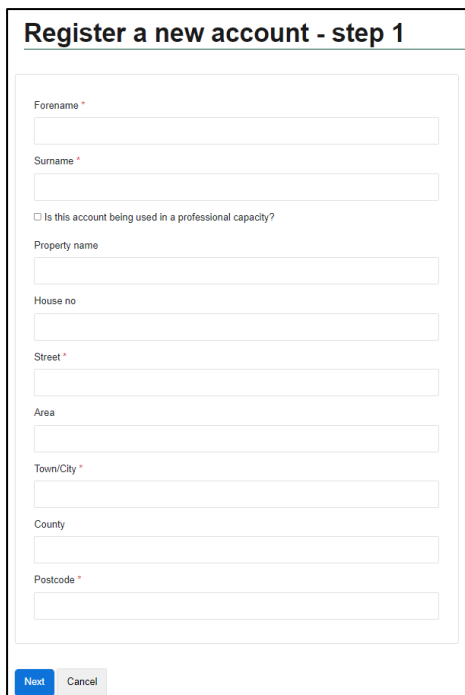
1. The Delegation Portal

The following process will cover the steps when a child is at the assessment, consultation and review stages.

The SEND team will send you a request to complete and submit reports, via the Delegation Portal.

1.1. Access and Signing into the Delegation Portal

Open the email you have received from the SEND team. A weblink to the Delegation Portal will be included in the email.

- Alternatively click this link to navigate to the Delegation Portal.

o Click the **Register** button (to begin the account creation process).

- Enter: Forename and Surname.
- Tick: Is this account being used in a professional capacity? > Enter role and Organisation.
- Enter: Your Address Details.
o Click the Next Button to process.

Register a new account - step 1

Forename *

Surname *

☐ Is this account being used in a professional capacity?

Property name

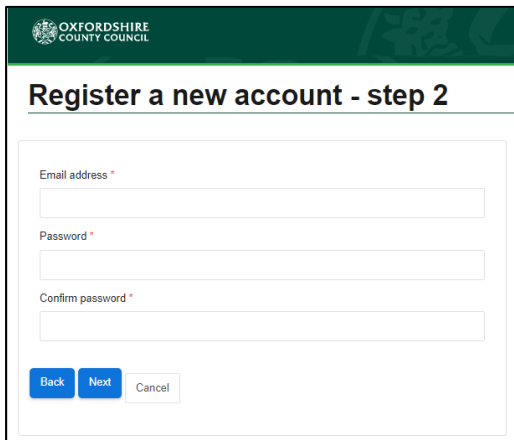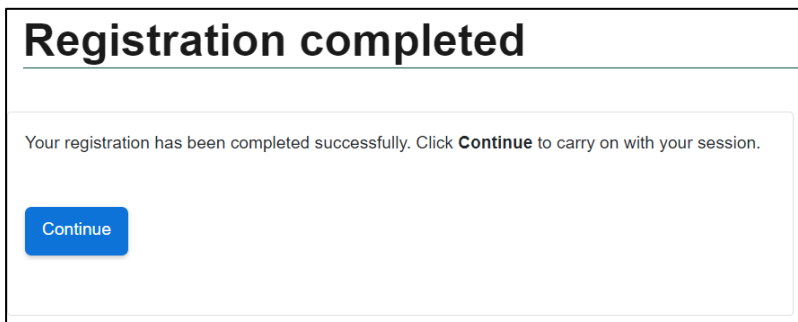House no

Street *

Area

Town/City *

County

Postcode *

[Next] [Cancel]
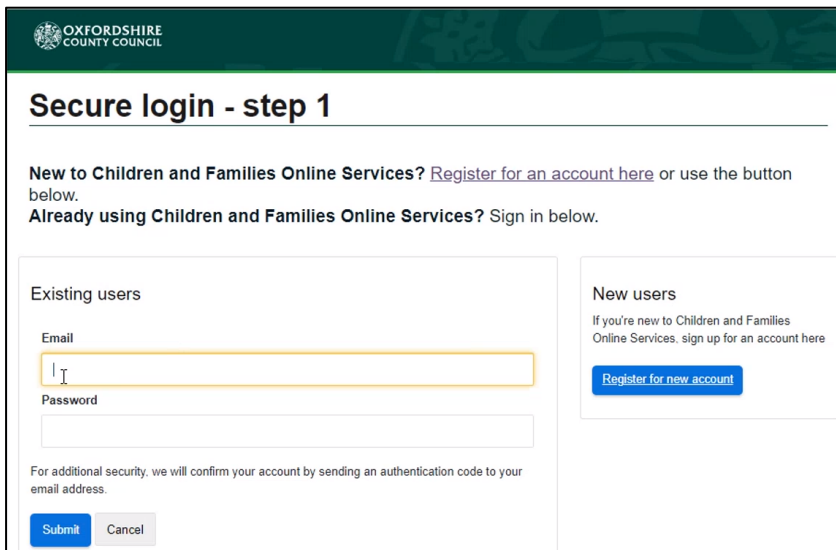
o Enter your Email Address.
- Enter your Password.

o   Click the Next Button to proceed.

- The portal will send a code to your email account, to confirm your email address.
- Enter the code and click the next button.
- Click the continue button on the Registration completed page.
- The Registration process is now complete.

o   **Existing Users with an account:** Enter Email Address > Enter Password > Click Submit button.
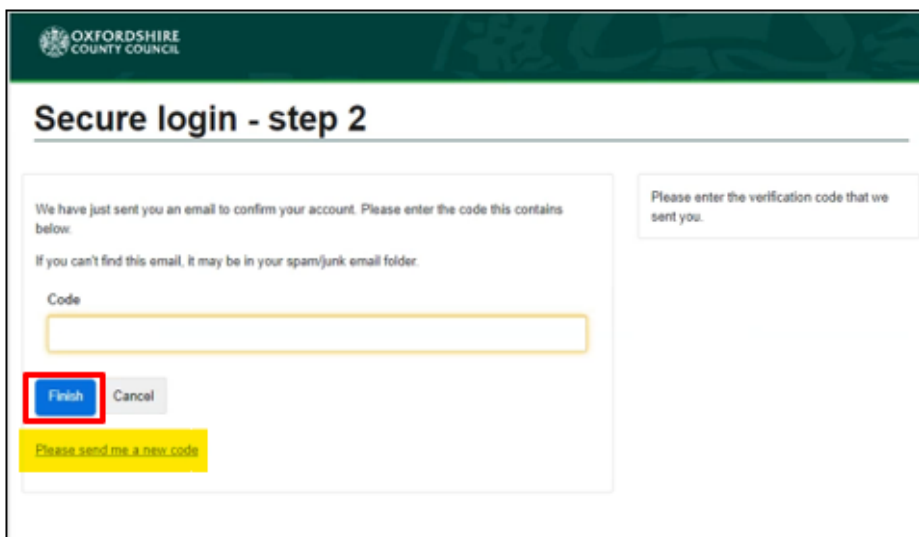
A verification code will be sent to your login email address, the code is used to authenticate your account.

o   Enter the code that was sent to your email address.
o   Click the Finish button to complete the login process.

•   Please be aware that the verification code only lasts for 10 minutes. Select the "**please send me a new code**" button if you require a new code.

1.2. The Delegation Portal Landing Page

The Delegation Portal Landing Page is where all the tasks and forms requiring your contribution.

The currently assigned, recently retracted tasks and Recently Submitted Tasks are designed to help the user manage pending tasks.

The screenshot below shows the tasks tabs within the Delegation Portals Landing page.
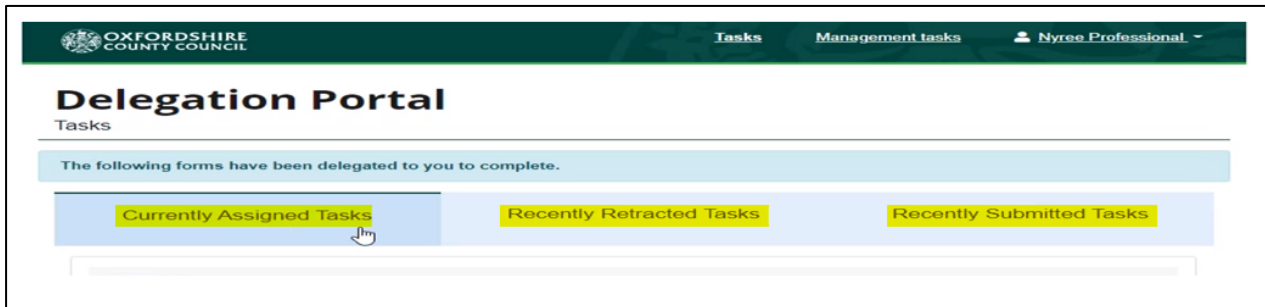
- **Currently Assigned Tasks >** *This tab contains tasks / forms currently assigned to you.*
- **Recently Retracted Tasks >** *This tab contains tasks / forms the SEND team have retracted within the last 30 days. You will receive an email when the form is retracted.*
- **Recently Submitted Tasks >** *This tab contains tasks / forms you have submitted within the last 30 days.*

The Screenshot below Display the additional options on the landing page:
- **Task Button**: Use this button to navigate back to the Landing Page.
- List underneath Username:
  o **Update account** > Update Account details inc. Password.
  o **Automatic Replies** > Set up an out of office for your account. This is not linked to your Outlook or email account. Please add to the out of office reply who the SEND team should send the task to in your absence. They will see your out of office message before delegating the form to you.
  o **Logout** > Logout of the Portal.
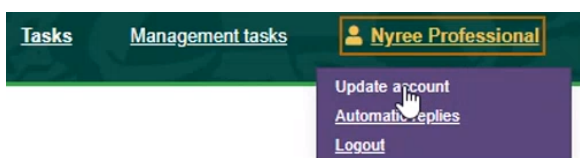
1.3. Selecting a Delegation Portal task

The example below shows the **EHCNA Information Gathering,** but all the other forms work in the same way, e.g. consultation report, review reports etc.

- Select a report within the Currently Assigned Task List.

1.4. Adding a Contribution to a Delegation Portal Task

- Review the 1. Details of the Child or young person – Standard page, some of the text boxes are pre-populated.
- Add further details in the free text boxes as necessary.

- Add further details in the free text boxes and confirm the relevant option in the drop-down menus. Click the plus or minus buttons to add rows to the fields.

- Add the name of the Reports and dates within the Reports section. **Remember to attach the documents on 3. Supporting Documentation.**

1.5. Adding Supporting Documentation

*This page requires you to attach all the documentation that supports the assessment. **Please upload files individually and ensure the correct file versions are named correctly.***

- Click the Choose File button.
- Select the file you wish to upload from your laptop or PC drives.
- Click the open button.

- If no counter signatory is needed, click the Submit Contribution button once you have finished attached the supporting documents. If a counter signatory is needed, then follow the step 1.6 below before submitting the form.

- The form will be moved Recently Submitted Tasks, you can print or download the form from this point, the form will be available for 30 days.

1.6. Adding a Counter Signatory

Your manager will take responsibility as the Counter Signatory if you would like them to review / amend the form.

- Select the **Re-Assign** button on the EHCP Information Gathering Form.
- Locate: your manager from the list.
- Click: Select user button.

o *Your manager will log into the portal, access their task work tray, and counter sign the form.*
o *The final step is for your manager to click the Save and Submit Contribution buttons.*
o *The form will now appear in the Recently Submitted Tasks Tab for 30 days.*

- Click your name > Select the Logout button, to **securely log you out of the portal.**

2. Frequently Asked Questions

Some of the questions that were asked during the online training sessions are listed below. This list will also be published on the support pages SharePoint site for the project. It will edited/added to as more feedback on the new systems is provided.

Question	Answer
How soon can you set up an account?	The system will go live on the 16th August 2021; therefore, we are unable to set up any accounts prior to this date. The relevant links will be published in several places, OCC will publish comms on the public-facing website and there will also be a SharePoint site to access the relevant resources.
Are the forms changing?	The operational procedures and forms will remain as current.
Will we receive a link when a child's case is due to be transferred to the new system?	Current EHCP's will be methodically migrated to new system. You will receive an invite to join the Portal when your child's case is moved over.
Can we share our login details for all parties to see?	No, OCC do not recommend sharing usernames or passwords. OCC suggest that you download the form and collaborate with others to complete it.
Will applications already in progress be moving to the new systems?	Applications that are already in progress will not be affected at this stage. As applications reach the annual review stage, they will be migrated to the new online systems.
Will consultations continue to be sent out via Egress, before and after the 16th August?	Any assessments currently in transit, will be processed as per the current process. New forms, assessments or reviews will be processed in the Liquidlogic systems after the 16th August.
How does the annual review process fit into the new ways of working via the Portal?	New applications to be completed within the Portal; OCC will process any annual reviews that are completed from September. Plans will be manually moved into the systems. Schools will be asked to interact with the Portal during the annual review process. Schools will request forms from

	Health Partners, then submit forms back to the Council via the Portal.
Do Health partner staff have to log into the Portal as a clinician to provide advice?	Yes, Health partner staff will have to log into the Portal as clinicians. Requests will go to an Admin, who will delegate the tasks to Health partner staff. Health staff will need to log into the Portal and pick up the tasks from their shared work tray.
What happens if a clinician is asked to send their most recent clinical letter or document?	An Admin within Health will need to attach the letter as a document within the Portal. Depending on the nature of the team, OCC envisage teams adapting to new ways of working with the Admin, who delegate tasks. OCC and the Health partner staff will work together to set up shared work trays. An Admin for the work tray will delegate incoming tasks or attaching and sending back to specific work trays.
Will the medical forms completed by parents be attached to tasks pushed out to Health partner staff?	The Portal does not currently have the functionality to receive pushed medical forms. OCC will continue to email forms for you to attach in the Portal. Parents will be requested to complete the forms within the Portal.
How can a Health partner confirm that they will not report on a child not known to the service within the Portal?	The documents will continue to be emailed out to Health Partners; therefore, please can you decline reporting on a child via email. OCC will then revoke the form.
How does the annual review process fit into the new ways of working via the Portal?	New applications are to be completed within the Portal; OCC will process any annual reviews that come back from September. Plans will be manually moved into the systems. Schools will be asked to interact with the Portal during the annual review process. Schools will request forms from Health Partners, then submit forms back to us via the Portal.
Can two people work on a form at the same time?	No, only one person can complete the form at a time. OCC recommend using the *Re-Assign* tool if you want to collaborate on a form. A form can be re-assigned multiple times.

Are the free text boxes within the forms mandatory to complete?	The fields marked with a red asterisk are mandatory. All other fields can be completed as required.
Do you receive a prompt or alert when you receive a message in the Portal?	Yes, a notification email is sent out to the Portal user when there is a new message or task.
Can we set up a group within the Portal?	This task will be created in the Task Management system. The SEND/Admin teams will set up groups. Partner organisations need to inform the relevant SEND/Admin teams on the structure of the groups that need to be set up.
Can we add documents?	Yes, you can add documents within the Portals. Documents can be added under the Supporting Documents section of forms.
Is there an email mailbox for the SEND team?	Details of the SEND team contacts can be found in the next section: Support.

3. Support

As this is a multi-agency function, there is more than one support service depending on the issue being experienced. The EHCNA/P Support Model below outlines the procedure for obtaining the relevant support.

Your first port of call for any issues relating to the EHCNA/P system or process should be your OCC SEN Officer and Area Administrator.

You will be able to reach the relevant team SEN Officer directly and Area Administrator at the following email addresses:
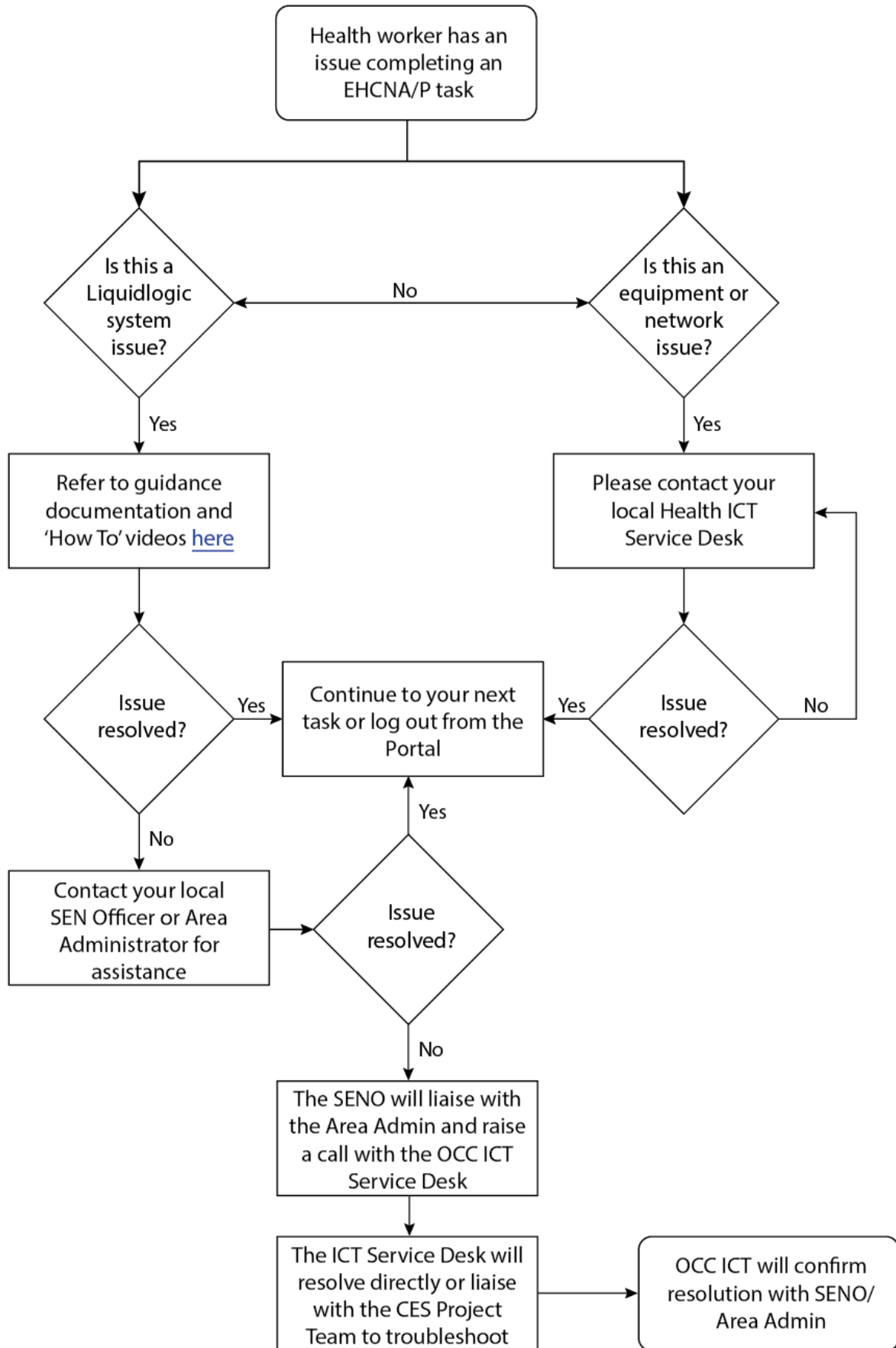
- SEN North Team SENNorthTeam@Oxfordshire.gov.uk
- SEN South Team SENSouthTeam@Oxfordshire.gov.uk
- SEN Central Team SENCentralTeam@Oxfordshire.gov.uk

For issues relating to your work-issued IT equipment (laptops, phones, printers etc.) or if you have an issue with your network connectivity network, please contact your regular Health IT Service Desk.

For reference, the *Portals Implementation Timeline by Audience* graphic has been included following the Support Model. This shows the high-level actions for the implementation of the new online EHCNA/P systems and processes over the coming months for each involved service/agency/person.

If you have any queries relating to the Children's Education Systems implementation, you can reach the project team at the following email address:

- Children's Education systems Project Team:
  childrenseducationsystems@oxfordshire.gov.uk

Health worker has an issue completing an EHCNA/P task

Is this a Liquidlogic system issue?

Is this an equipment or network issue?

No

Yes

Yes

Refer to guidance documentation and 'How To' videos here

Please contact your local Health ICT Service Desk

Issue resolved?

Yes

Continue to your next task or log out from the Portal

Yes

Issue resolved?

No

No

Contact your local SEN Officer or Area Administrator for assistance

Issue resolved?

Yes

No

The SENO will liaise with the Area Admin and raise a call with the OCC ICT Service Desk

The ICT Service Desk will resolve directly or liaise with the CES Project Team to troubleshoot

OCC ICT will confirm resolution with SENO/ Area Admin

PORTAL IMPLEMENTATION TIMELINE BY AUDIENCE

	AUGUST 2021	SEPTEMBER 2021	OCTOBER 2021	NOVEMBER 2021	JANUARY 2022	APRIL 2022
Parents/Young People EY/SENSS (new)	**16/08:** New applications submitted through the portal.					
Parents/Young People (current)	**16/08:** Migration of current plans will start and parents/young people will start to receive invites to register with the portal.					
Schools	**16/08:** New applications submitted through the portal.		**OCT ONWARDS:** Schools receive consultation requests via the portal to complete. Documents will be emailed by admin alongside.	**NOV ONWARDS:** LIFT goes live – Business Support admin will start setting up payments ready for the new financial year in this system.		**APR ONWARDS:** Schools will start submitting annual review report form via the portal and completing the record of annual reviews via the portal.
Internal Admin/ Operational	**16/08:** New assessments requests processed in Liquid Logic. **16/08:** Funding approval forms in Liquid Logic.	**SEP ONWARDS:** Process annual reviews in Liquidlogic as the new term begins.	**NOV ONWARDS:** LIFT goes live – Business Support admin will start setting up payments ready for the new financial year in this system.		**WC 03 JAN:** The last assessments should be wrapping up in the ONE system – so *all work* should be taking place in Liquid Logic	**APRIL ONWARDS:** push out ROAR paperwork to schools as the AR reminder. Push out AR reports gathering form to schools through the portal.
All professionals: Schools/Health/EY/ EP/SENSS		**MID-SEP ONWARDS:** Expect the first report requests to come in through the portal - documents will be emailed by admin alongside.				
Social Care		**WC 20 & 27 SEP:** Social Care will receive the delegated forms on Liquidlogic for their report requests.				
All Internal Staff						**APRIL ONWARDS:** EYES goes live – placement information will be available and SENSS, EP and Early Years will be within the system