EHCNA/P Liquidlogic Portals Guidance for Schools

CES Project Team

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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 schools is the new online *Education and Health Care Needs Assessment / Plan (EHCNA/P)* process via the Liquidlogic Children's and Delegation Portals.

The operational EHCNA/P procedures will remain the same, but the Council will be requiring schools to register for a new *Children's Portal* account to submit new EHCNA applications and communicate with Council staff quickly, easily, and securely.

In order to progress the ECHNA statutory work, schools will also need to register and utilise the Liquidlogic *Delegation Portal* in order to securely and seamlessly:

1. Submit reports as part of the Assessment stage.
2. Submit the consultations.
3. Submit the ROAR as part of the Annual Review stage and any relevant reports as a document attachment.

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.

The Children's Portal
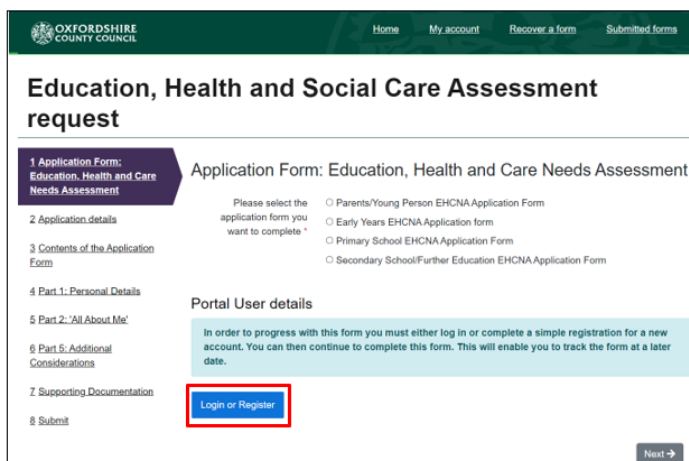
1. Accessing the Children's Portal

The following steps shows how to access the Children's Portal and start an EHCNA request.

- Click the link below to navigate to the Children's Portal:
  https://myehmportal.oxfordshire.gov.uk

o Click: **Education, Health and Care Needs Assessment** to start EHCNA request.
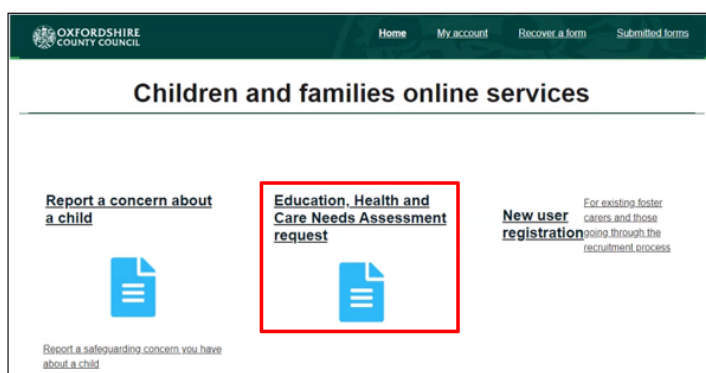
2. Logging in or Creating a Children's Portal Account.

o Click: **Login or Register** (to begin the form 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.

- Enter your Email Address.
- Enter your Password.
- Click the Next Button to proceed.
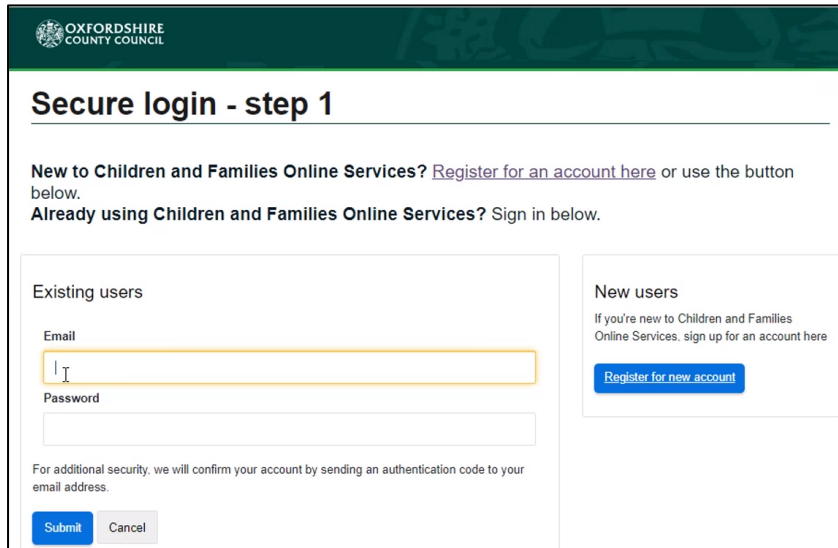

- The Portal will send a code to your email account, to confirm your email address.
- Enter the code and click the next button.
- Click the continue button on the Registration completed page.
- The Registration process is now complete.

- **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.

- Enter the code that was sent to your email address.
o Click: 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.

3. Completing an Education, Health and Social Care Needs Assessment

3.1. Navigation within the Children's Portal

- Click on your name at the top of screen to view to the following options:
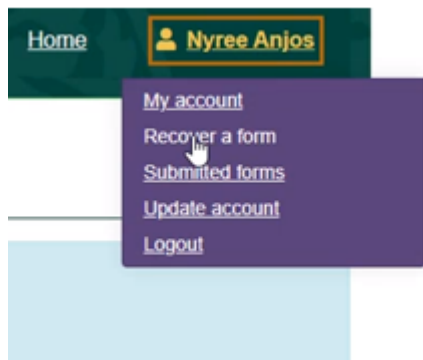
o **My Account** > Click to view and manage account details.
o **Recover a Form** > Click to view and resume recently saved forms.
o **Submitted Forms** > Click to view, download or print submitted forms.
o **Update Account** > Click to change your profile details or password.
o **Logout** > Click to Logout of the Portal.

You can navigate through the form by using the next Button at the bottom of the page ***Alternatively, click on the links located on the left side of the webpage to move onto the next steps of the form.***

Explanation of the buttons at the bottom of the page
- The **Print** button allows you to print the application.
- Click the **Save for later** button, after completing each page. The form will be saved for 30 days.
- The **Previous and Next** buttons will allow you to toggle between the form.
- The **Create PDF** button creates and downloads a PDF version of the form.
- Click the **Close** button to exit the form and return to the Portal's landing page. Select the **Recover a form** button to continue a form.
- Click the **Cancel** Button to exit the form and return to the landing page.
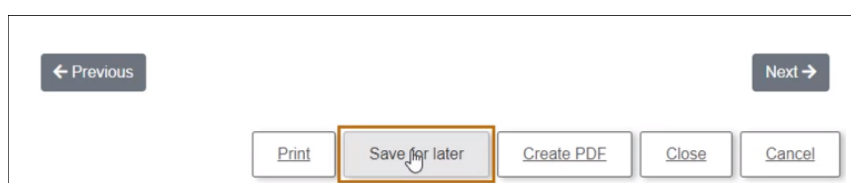
3.2. Education, Health and Social Care Assessment Request Page

- Once you have registered for an account and you return to the form, select a form you wish to complete.

Application Form: Education, Health and Care Needs Assessment

Please select the application form you want to complete *

- ○ Parents/Young Person EHCNA Application Form
- ○ Early Years EHCNA Application form
- ○ Primary School EHCNA Application Form
- ○ Secondary School/Further Education EHCNA Application Form

Portal User details

In order to progress with this form you must either log in or complete a simple registration for a new account. You can then continue to complete this form. This will enable you to track the form at a later date.

- Tick: The relevant statement(s).

REQUEST FOR AN EDUCATION, HEALTH AND CARE NEEDS ASSESSMENT

Please tick the relevant statements

☐ I am the parent and I am writing to request an Education, Health and Care needs assessment under section 36 of the Children and Families Act 2014.

☐ I am 16 or over and am writing to request an Education, Health and Care needs assessment under section 36 of the Children and Families Act 2014.

I am a professional writing to request an Education, Health and Care needs assessment under section 36 of the Children and Families Act 2014.

I am a representative of the following school/setting:

○ Early Years Setting
◉ Primary School
○ Secondary School

3.3. Contents of the Application Form

- *This page contains guidance to help complete the form. The **Local Offer** link provides further information to assist your request.*
- Click Save for Later and Next buttons to continue the form.
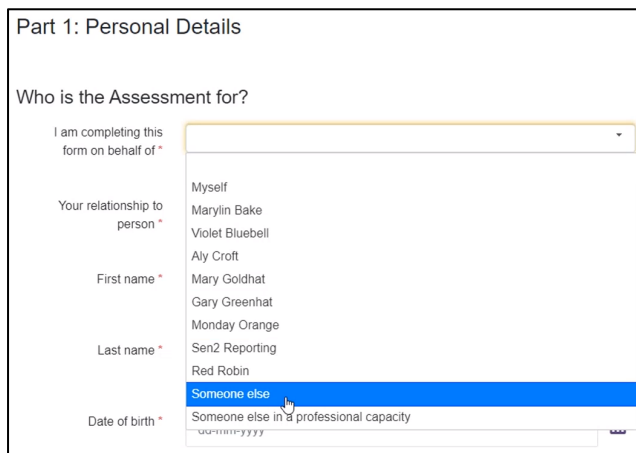
Contents of the Application Form

Part 1 Personal Details
This contains personal information relating to the child or young person and their family members and carers.

Part 2 'All About Me'
This section is to record the views, interests and ambitions of the child or young person.
There is guidance on how this can be gathered available through the Local Offer.

3.4. Part 1: Personal Details

- Select the Option from "I am completing this form on behalf of".
- Enter the details relating to the person who requires an assessment.
- You will not be able to proceed without completing all mandatory fields.
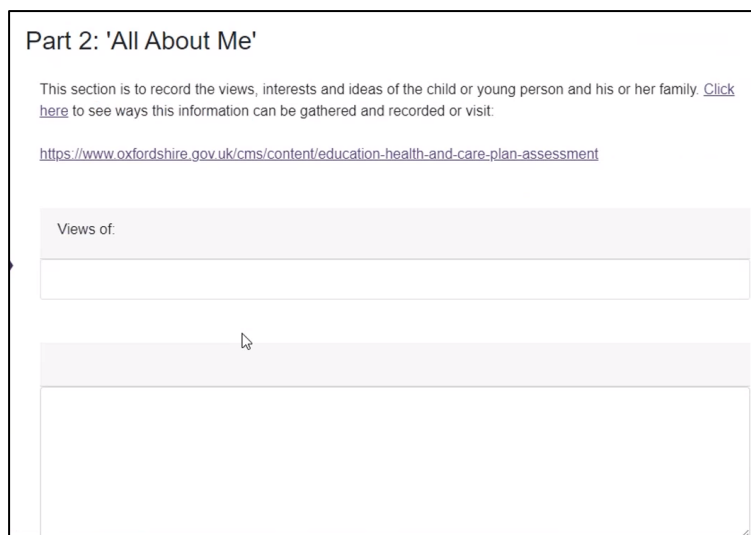
3.5. Part 2: All About Me

- **These are free text boxes that expand, they provide plenty of space to record all the relevant information.**

3.6. Part 3: Education, Health, Care Strengths, Needs and Support

*This section requires you to provide evidence of the child's SEN, in addition to the school's actions to support the child. **The documents will be attached in Section 10. Supporting Documentation of the form**.*

- Enter the details of the documents that you will be attaching on section 10. Supporting Documentation.

- The **Full Screen** button will allow the user to view the tables only.

o Click close button to return to the form.

3.7. Part 4: Action to Meet Need by Other Agencies

Health Support/Social Care Support
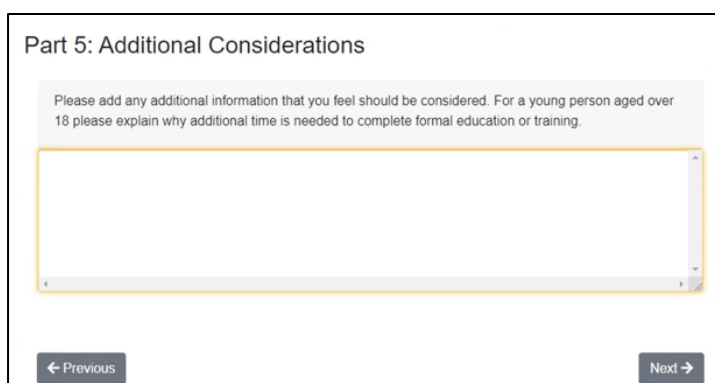
- This is where you can add the details of the involvement and support provided by Health and Social Care services.
- You can add and remove rows to capture further support the child receives. Add **the name of the relevant documents** (Attached to Section 10. **Supporting Documentation**).

3.8. Part 5: Additional Considerations

This page allows the user to provide further details, that should be considered for the assessment request.

- Enter additional information that will support the assessment, In the free text box.

3.9. Part 6: Consent – School/Setting Submitting Application

*This page requires you to confirm if you have the Consent form and/or the Medical questionnaire, **which will need to be attached as evidence on Section 10. Supporting Documentation.***

3.10. Part 10: 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.

- An error message will appear when you try to attach the wrong file format. Click the Clear button to remove the error file and continue the process.
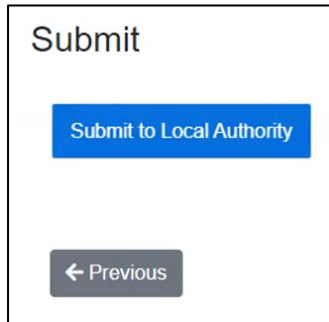
3.11. Submitting Assessment Form

Once you have completed all the details, submit the form to the Local Authority.
Please remember to review the form before submitting, as you will not be allowed to amend the form after submitting.

- Click the **Submit to Local Authority** button to send the form – to the SEND Team to process the application.
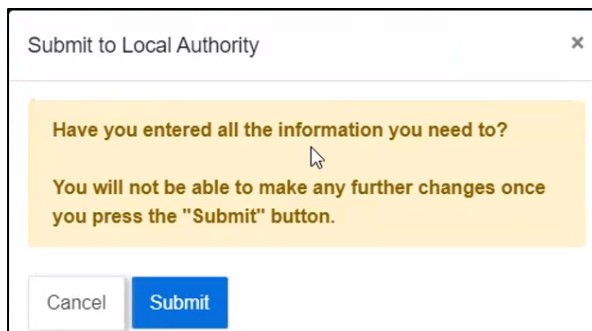
Submit

Submit to Local Authority

← Previous

- Click submit on the prompt message.

Submit to Local Authority ✕

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.

Cancel   Submit

- The Portal will direct you to the Submitted Forms page.
- The completed form will appear as the first entry under Submitted forms tab.
- The form will be viewable/downloadable for 30 days.
- Click the "Portal EHC Assessment" link to view, print, save or email the form.

Submitted forms

Home

Recover a form

View submitted forms

Recently Submitted Forms (Last 30 Days)

Details	Name	Date	Response
Portal EHC Assessment	Harry Redhat	14 Jul 2021	No response posted
Portal EHC Assessment	Red Robin	14 Jul 2021	No response posted
Portal EHC Assessment	Mary Bluehat	13 Jul 2021	No response posted
Portal EHC Assessment	Donald Duckling	13 Jul 2021	No response posted
Portal EHC Assessment	Daisy Flower	13 Jul 2021	No response posted
Portal EHC Assessment	Sen2 Reporting	28 Jun 2021	No response posted
Portal EHC Assessment	Mary Orangehat	23 Jun 2021	No response posted
Portal EHC Assessment	Honey Bee	14 Jun 2021	No response posted

3.12. Form Completed

The Form is now completed, log out of the Portal if you are finished with your task.

- Click your Username on the top right-hand side of the Portal.

Home   **Nyree Anjos**

My account
Recover a form
Submitted forms
Update account
Logout

- Select the Logout button, to **securely log you out of the Portal.**

OXFORDSHIRE
COUNTY COUNCIL   Home   My account   Recover a form   Submitted forms

You are now logged out of Children and Families Online Services

Click Home to go the home page, or Login to login again.

Home   Login
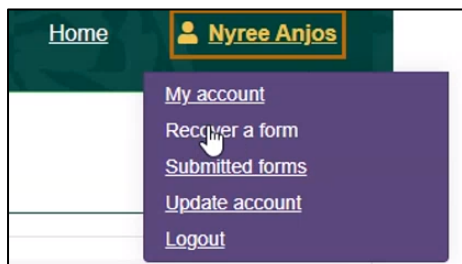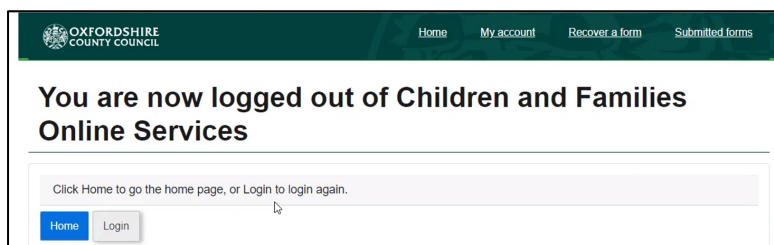
- The Portal will allow you to return to the home screen or Log back into the system.

Children and families online services

Home | My account | Recover a form | Submitted forms

Report a concern about a child

Report a safeguarding concern you have about a child

Education, Health and Care Needs Assessment request

New user registration For existing foster carers and those going through the recruitment process

4. 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.

4.1. 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.
- Refer to section 2. Logging in or creating a Children's Portal Account or Logging in.

4.2. 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.
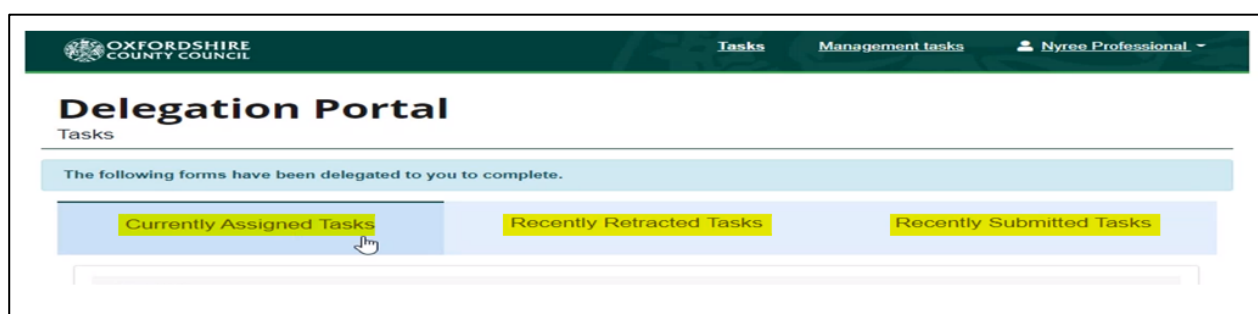
- **Currently Assigned Tasks >** *This tab contains tasks / forms currently assigned to you.*
- **Recently Retracted Tasks >** *This tab contains tasks / forms the SEND team have retracted within the last 30 days. You will receive an email when the form is retracted.*
- **Recently Submitted Tasks >** *This tab contains tasks / forms you have submitted within the last 30 days.*

The Screenshot below displays the additional options on the landing page:
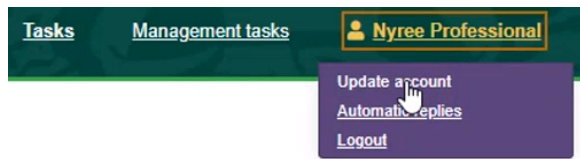
- **Task Button**: Use this button to navigate back to the Landing Page.
- List underneath Username:
- o **Update account** > Update Account details inc. Password.
- o **Automatic Replies** > Set up an out of office for your account. This is not linked to your Outlook or email account. Please add to 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.

4.3. Selecting a Delegation Portal Task

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

- Select a report within the Currently Assigned Task List.

4.4. Adding a Contribution to a Delegation Portal Task

- Review the 1. Consultation – Standard page, some of the text boxes are pre-populated.
- Add further details in the free text boxes as necessary.

Delegation Portal

Task

1 Consultation - Standard	Name: Cali Bear DOB: 01-Jan-2013 Address: 15 Test Street, Testertown, TS1 1ST	Required By: 28-Jul-2021

(Form Type: EHCP School Consultation. Comments: Please complete the consulation. Sent By: Nyree Ellison-Anjos. Department: EHM ICT Applications and Systems Team. Telephone: 01452025410. Address: EHM ICT Applications and Systems Team Speedwell House, Speedwell Street, OXFORD OX1 1NE)

2 Consultation Response Form

3 Supporting Documentation

Consultation - Standard

Name of Pupil: Cali Bear

Date of Birth: 01-Jan-2013

Date: 14-07-2021

- Review the 1. Consultation Response Form.

Delegation Portal

Task

1 Consultation - Standard

2 Consultation Response Form

3 Supporting Documentation

Name: Cali Bear DOB: 01-Jan-2013 Address: 15 Test Street, Testertown, TS1 1ST
Form Type: EHCP School Consultation
Comments: Please complete the consulation

Required By: 28-Jul-2021
Sent By: Nyree Ellison-Anjos
Department: EHM ICT Applications and Systems Team
Telephone: 01452025410
Address: EHM ICT Applications and Systems Team Speedwell House, Speedwell Street, OXFORD OX1 1NE

Consultation Response Form

Relevant legislation and statutory guidance
s33 and 39 of the Children and Families Act 2014
SEND Code of Practice 9.78 to 9.94

- Add further details in the free text boxes and confirm the relevant option in the drop-down menus.

Setting to complete

Student Name: Cali Bear

DOB: 01-Jan-2013

Setting Consulted:

Start date requested: dd-mm-yyyy

Able to offer a placement?

If Yes start date: dd-mm-yyyy

- Add the name of the document, author, and date within the Any attached Supporting Information section. **Remember to attach the documents on 3. Supporting Documentation.**

4.5. 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 4.6 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.

4.6. 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.

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

5. Tasks Assigned to Work Groups: Annual Review Form

The "Work Group" is a tray; tasks can be sent to, picked up and re-assigned within your team.

- *The review meetings will take place during term time, A separate form will be sent out eight weeks prior to the meeting. The Local authority will request the form before the annual review meeting.*

5.1. Picking up Annual Review Form

- On the Delegation Portal landing page, locate Tasks Assigned to your work groups section.
- Click the Pickup button.

- Select the Annual Review Meeting in the **Currently Assigned task list complete the form and submit to the Local Authority**.

- The completed form will remain under Recently Submitted Tasks for 30 days. You can print or download the form during this period.

Currently Assigned Tasks	Recently Retracted Tasks	Recently Submitted Tasks

Recently Submitted Forms (Last 30 Days)

Form Type	Name	Date Submitted
Annual Review meeting of an EHCP	Mary Crofty	14-Jul-2021 10:57
EHCP School Consultation	Cali Bear	14-Jul-2021 10:46
EHCP Information Gathering	Cherry Pie	14-Jul-2021 10:42
Annual Review meeting of an EHCP	Red Robin	13-Jul-2021 15:46

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

6. 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 are 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.
What is the process if you are waiting for a Draft EHCP? How do we communicate with our SENO?	OCC will process the EHCP in the existing system. Should a plan be issued, it will be moved over to the new system. You will receive an invitation to the new system at that point.
Will Headteachers continue to automatically receive consultations via emails, or do they need to sign up to the Portal too?	The consultations documents will be emailed out, but the forms will be delegated via the Portal. Headteachers need to create an account to use the Portal and join their group for oversight.
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.

7. 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:
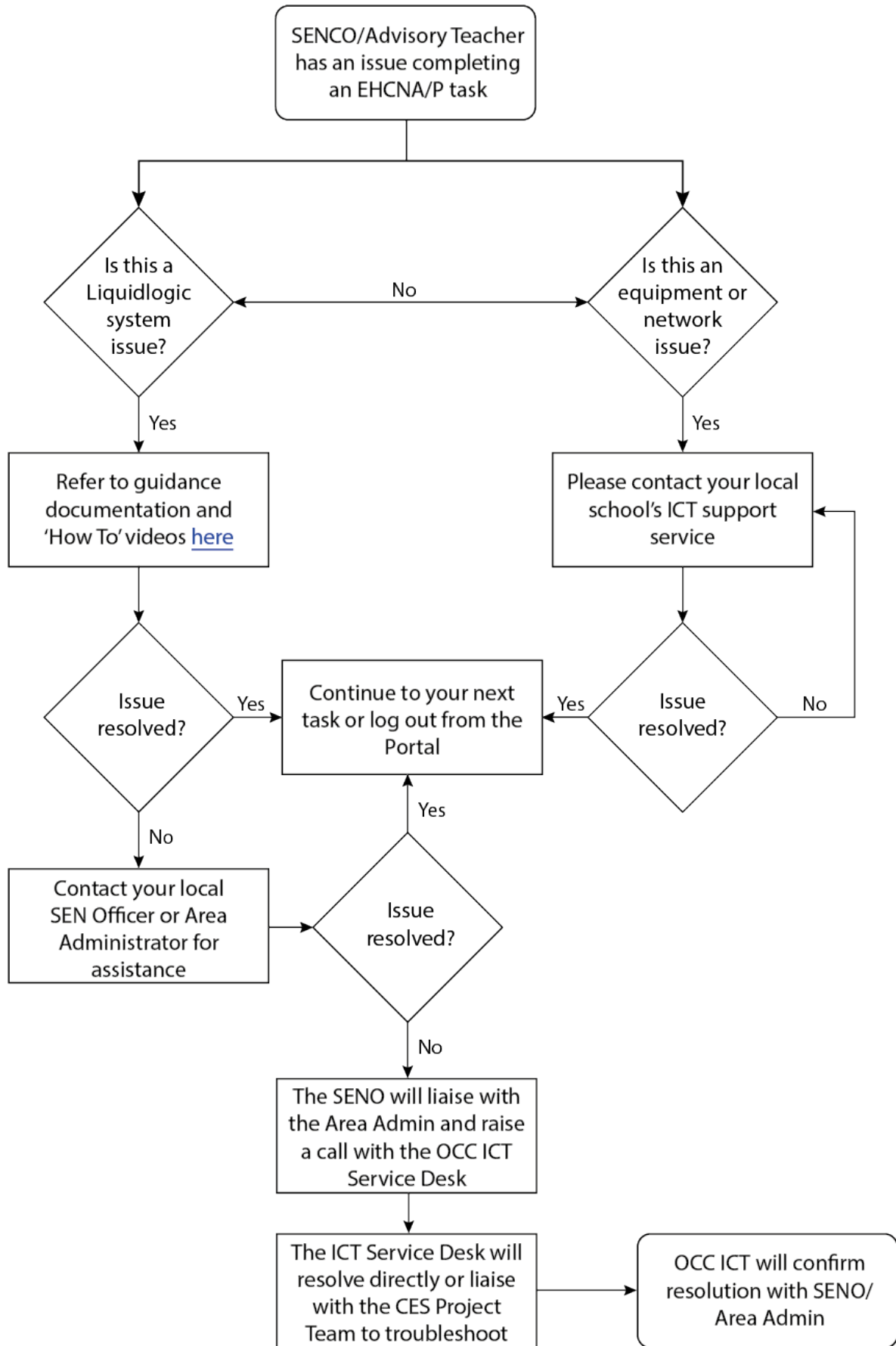
- SEN North Team SENNorthTeam@Oxfordshire.gov.uk
- SEN South Team SENSouthTeam@Oxfordshire.gov.uk
- SEN Central Team SENCentralTeam@Oxfordshire.gov.uk

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 school's IT service support provider.

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

SENCO/Advisory Teacher
has an issue completing
an EHCNA/P task

Is this a
Liquidlogic
system
issue?

No

Is this an
equipment or
network
issue?

Yes

Refer to guidance
documentation and
'How To' videos here

Yes

Please contact your local
school's ICT support
service

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