Liquidlogic EHCP Implementation: Phase 2

May 2023: SENCO Forum

Suffolk County Council

Phase 1 of the Liquidlogic EHCP Implementation successfully went live on Monday 3rd April 2023.

- Use of new caseload management system by SEND Family Services to support better data recording and reporting, and greater visibility across services.

- The EHCP Portal was also launched on the 3rd April; this is the new central front door for EHCNA requests received by the new EHCNA request team. Verified portal users (families) will be able to view their allocated worker, message their worker, view documents and complete forms via the portal.

Key deliverables for Phase 2:

- The roll out professional portal functionality to education settings to support the Annual Review process.

- Schools will also be asked to provide details to fulfil information governance requirements to allow a dashboard to be shared with settings with details of their children with an EHCP; this will be the starting point for the future direction of travel for information sharing with schools.

- We will actively engage with a variety of stakeholders to ensure that the solution is reflective of requirements including education settings, early years and further education representatives, school transport representatives and SPCF.

The Professional Portal and Dashboard reporting

The Professional Portal will enable education settings to submit Annual Reviews and associated documentation to the local authority in a digitised format.

- Nominated individuals within a setting or trust will have visibility of Annual Review tasks assigned to the setting's portal work group requiring attention.

- Setting work group members will have the ability to pick up tasks (Annual Review Report forms) for completion; once picked up, the form contents can be saved for later, exported as a PDF or submitted once complete. Attachments can also be added.

- Users can also reassign tasks to other individuals within the setting's workgroup, or to another workgroup they also manage (eg; another setting within your trust), for required contributions and input into the form before submission to the local authority.

- Workgroup managers can also reassign tasks picked up by individuals back to the Workgroup, supporting the effective management of workload associated with ongoing reviews.

- Each time a task is sent to the work group for completion, is picked up, or is completed and submitted, an email notification is sent, alerting users to the update.

New dashboard reporting

- Power BI dashboard providing oversight of the Annual Review caseload for the setting.

- The information within the dashboard will be updated daily and will include line level data on children and young people with an EHC Plan within your setting, with the associated latest Annual Review date and status and associated worker details.

Suffolk Professional Portal

Tasks

The following forms have been delegated to you to complete.

Currently Assigned Tasks	Recently Retracted Tasks	Recently Submitted Tasks

Task List

No.	Form Type	Name	Due Date	Comments		Actions
1	EHCP Review Report	Test Tester	17-Mar-2024	Dear SENCO, please complete Annual Review Report for Test Tester.		Re-Assign

Tasks Assigned to your Work Groups

Work Group	Form Type	Name	Due Date	Comments	Actions
Test Academy (EHM)	EHCP Review Report	Test Test			Pickup

Choose Professional to Re-Assign to

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

Work Groups you Manage

Work Group	Email	
Test Academy		Select Group
Test Academy		Select Group

Users within the Work Groups you Manage

Name	Email	
	@gmail.com	Select User

The Professional Portal and Dashboard reporting

- The portal, alongside additional reporting functionality, will support settings to have an improved oversight of their children and young people's Annual Reviews.
- Use of the portal to return Annual Review documentation will result in information submitted by settings landing directly within the Liquidlogic caseload management system alongside existing EHC information.
    - Improved auditability of Annual Review information
    - Streamline the Annual Review process to support timeliness.
- This implementation also facilitates a more consistent approach to the annual review process and working with settings which will support families who change education setting.

Microsoft Form, Code of Connection and Information Sharing Agreement

To allow for the initial roll out of this functionality beginning in the Autumn term 2023 we will be reaching out to education settings to ask them to:

1. Complete a Microsoft Form to provide details of staff who will require portal access
    - We recommend nomination of at least 3 members of staff who are involved in the Annual Review process within your setting (to ensure contingency and enable all required individuals to have access to the online forms for their contributions)
2. Complete a Code of Connection document
    - To provide necessary information around your setting's IT security
    - To be completed by IT lead(s) within your setting
3. Agree to an Information Sharing Agreement

Further details will be communicated.