

Liquidlogic EHCP Implementation: Phase 2

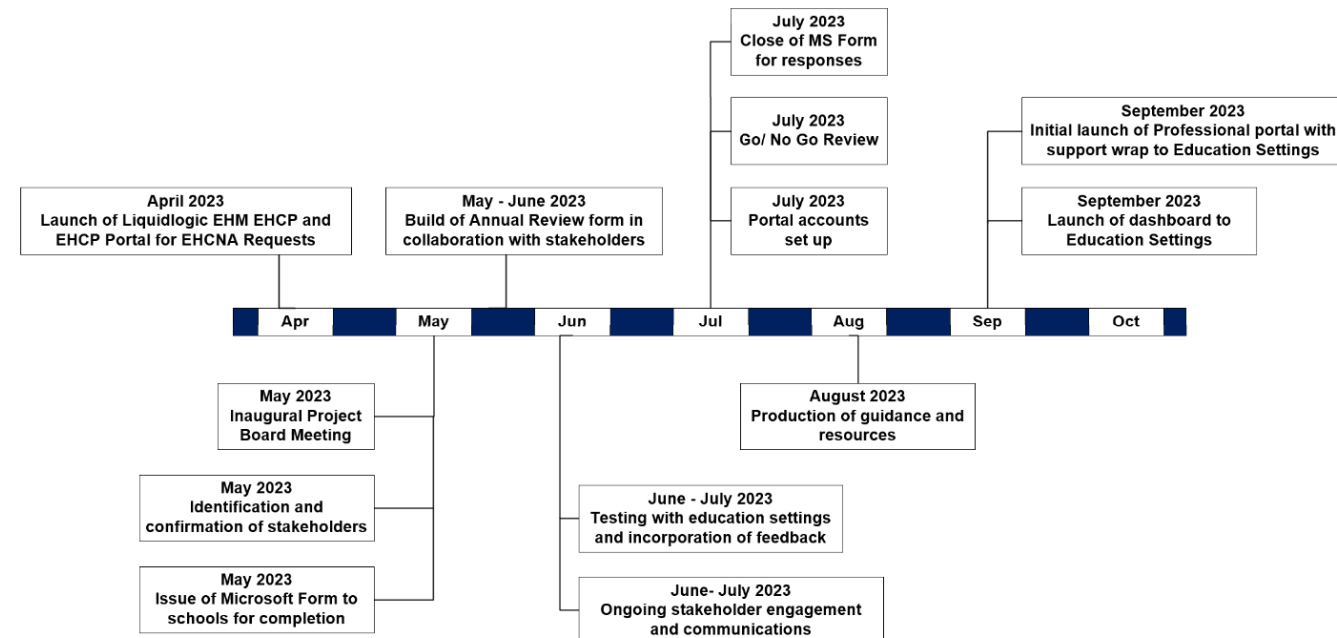
May 2023: SEND Programme Board Update

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

- Active EHCP involvements were successfully migrated, and those currently in the EHCNA process were manually migrated in cut over week.
- The service's existing form templates and letters have been built for use in Liquidlogic.
- The service have been required to complete eLearning and face to face training to enable their access to the system. System guidance, process maps and a SEND Services Manual have been produced to support the service
- The P&TS service also have access to Liquidlogic to allow them to refer to forms on system, and upload their reports. Users from Admissions, School transport, SES and HNF services have been provided read only access to the system to view EHC involvements
- Work continues to develop an automated solution to pull EHCP data from Liquidlogic back to Capita One. In the interim, Capita One will be manually updated with EHCP data from Liquidlogic
- 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 include:

- The roll out professional portal functionality to education settings to support the Annual Review process
- Schools will also be asked to sign a CoCo and agreed to an Information Sharing Agreement for IG purposes 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.



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.
- Tasks (Annual Review Report forms) can be picked up 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 for required contributions and input before submission.
- 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

- Education settings which utilise the professional portal to return Annual Review documentation to the local authority will also receive access to a 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 level data on children and young people with an EHC Plan for a 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

Portal and dashboard: associated benefits

- 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 in the Autumn term 2023, we are asking education settings to:

1. Complete a Microsoft Form to provide details of staff who will require portal access
 - Nomination of at least 3 members of staff who are involved in the Annual Review process within your setting who will be in post in September (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

Project Scope

Workstreams include:

- Build of Annual Review form (present an opportunity to ensure form is representative of the views of stakeholders eg; education settings, transport, parents/ carers)
- Internal (Liquidlogic) and external testing (Education Settings) of functionality
- IT support wrap for portal users
- Training: Production of guidance for use by users, and training support for SEND Family Services
- Automation of forms and exploration of additional potential
- Reporting: Build of dashboard and IT requirements for publication to education settings

Stakeholders

We will actively engage with a variety of stakeholders to ensure that the solution is reflective of requirements. Identified stakeholders are as follows:

- SEND Family Services
- Education Settings (PRUs, Independent, Specialist, Maintained, Academy Trusts, AP) and SENCO Forum
- Early Years Forum and Further Education Forum
- School Transport
- Suffolk Parent Carer Forum (SPCF) and SENDIASS
- CYP LT and SEND Programme Board

We will also keep additional stakeholders informed, including:

- Health, Social Care and Early Help professionals for their involvement in the EHC process
- LD&A (moving into Adulthood cohort)
- Standards and Excellence

Governance

- The Project Board will meet monthly
- Project risks should be escalated to the delivery managers for discussion at the Board
- The Project delivery managers will report on the project to the SEND Programme Board
- An EIA was produced to cover the use of portal functionality by families, professionals and staff prior to the commencement of Phase 1
- A DPIA has been produced for the sharing of information using the dashboard with schools

Risk Log:

Risk code	Risk	Description	Date	Countermeasure
R01	Limited Project Resource	Limited resource available to support implementation of portal	10/05/2023	Additional resource to be explored if required. Single points of failure to be avoided to establish team resillience
R02	Potential failure of schools to supply required details in a timely manner	Details required in advance to support the set up on professional portal accounts Limited timescales in relation to term dates	10/05/2023	Issue of Microsoft Form in a timely manner and extensive stakeholder engagement to communicate project vision. Potential for dedicated resource to engage with schools to support this task and escalate if required
R03	Technical capabilities of the portal (number of users and tasks anticipated)	Assurance is required that the portal (and support wrap) will be able to support the required number of users and large quantities of tasks within trays Document file size limit within Liquidlogic (for attachments exchanged via portal)	10/05/2023	Thorough testing to be conducted on the Professional Portal to ensure assurance
R04	Capacity and resillience within SEND Family Services	to adopt new process for Annual Reviews following phase 1 of the implementation	11/05/2023	Options for phasing to be further explored, discussed and agreed to minimise any potential negative impact on the service
R05	Potential impact on phased transfer work	October 31st deadline	11/05/2023	