

Schools Guide to Submitting an EHC Assessment Request and Annual Reviews

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School Guide to the new EHC Assessment process

Introduction

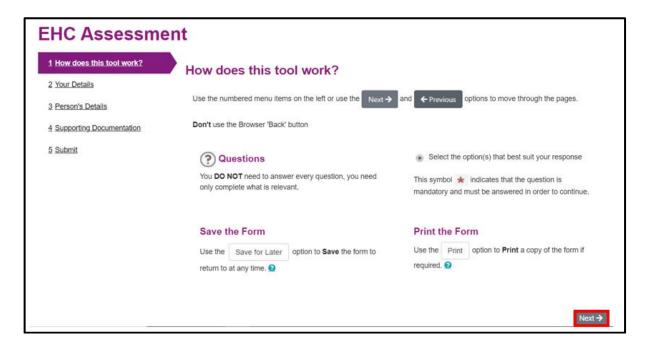
In March 2023 the SEND service moved to using Liquidlogic as a system of recording EHC Needs Assessments, Plans and Reviews. From 17th April 2023 it is expected that all requests for assessment, evidence and information gathering will be completed via the secure Liquidlogic Portal.

Accessing the form

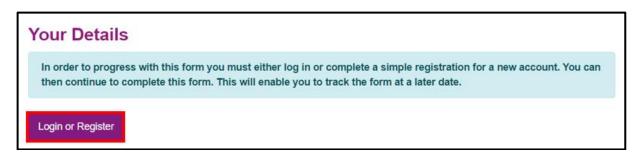
The form is available via the Children's Portal. Select SEND Referral once logged in.

This will open the EHC Assessment Request form.

Click Next



Click Login or Register



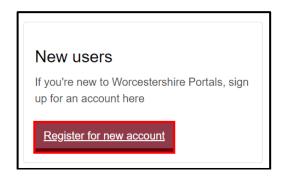
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New User Registration

An account is needed to use the system. Please register an account. This will also allow access to view any saved forms or forms submitted within the last 30 days.

Click on Register for new account



Complete all the details. Any section with a red * is mandatory and has to be completed before the account can be set up. Please tick that this account is being used in a professional capacity.

Scroll down the page for all the boxes to be visible.



Click **Next** (at the bottom of the screen)



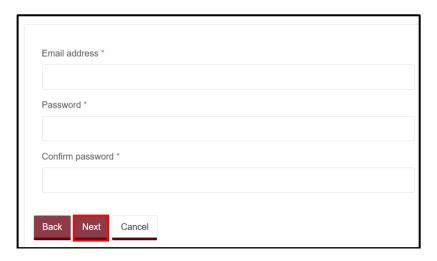
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Add the work email address. Please make sure it is spelt correctly as this is how to access into the system in the future.

Add a password that is easily remembered, but not one that is commonly used. It will also need to meet the password criteria (see below) for it to be allowed.

Add the password again in the Confirm Password box. Click Next



Password Policy

Your password must meet the following requirements:

- It must be at least 15 characters long
- It must contain at least one letter
- It must contain only letters, digits, and special characters
- It must contain at least one upper-case letter
- It must contain at least one numerical digit
- It must be different to your current password
- It must be different to your previous 8 passwords.

List of special characters that can be used:

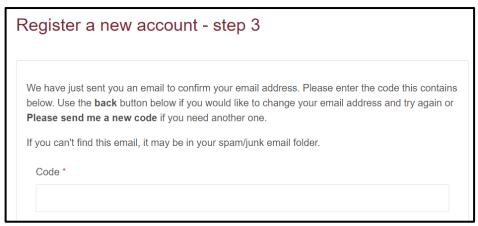
!"#\$%&'()*+,-.:;<=>?@[\]^_`{|}~

An email containing a verification code will be sent to the registered email. Please enter the code in the box. The easiest way to do this is by copy and paste, but it can be typed in. Check the number is correct before continuing.

If the email is not received, check spam or junk mail folders.

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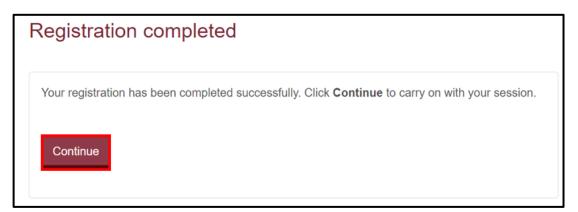
Once the code is entered and checked, click Next



If the code is not recognised, click on Please send me a new code link

Please send me a new code

The account has now been registered. Click Continue



The first time accessing the Liquidlogic portal, you will be asked to agree to the terms and conditions of use, read, tick to agree and press continue.

Click **Return to home** and select the **EHCP forms**, clicking on the relevant one or log out and return later.

Account Already Exists

If an account already exists, the system will display a warning message. Click **Continue** to log in or click **Forgotten password** to reset the password.

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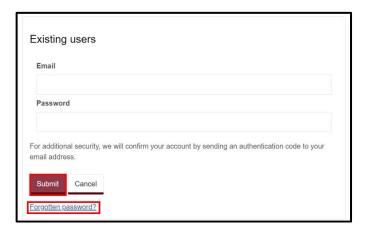
Logging In

Existing users only need to login, rather than register.

The portal session will stay active for 60 minutes from last use, and a warning message will appear asking "if you want to stay logged in" 2 minutes prior to end of session. It is advisable to save and continue regularly whilst completing the form.

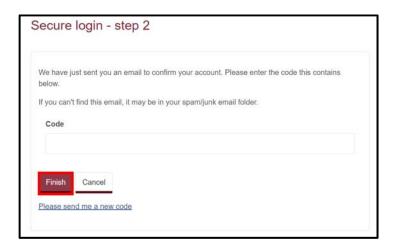
Please note that there is a current issue which means if making 2 requests for different children at the same time please log out and in again to make the second request.

Enter the **email address registered** and the **password** and then click **Submit**. Click **Forgotten password** to reset. (see <u>Password Policy</u> above)



A code will be sent to the registered email address. This code is for one time use only. A new code will be sent each time you log in.

Add the code and click on Finish

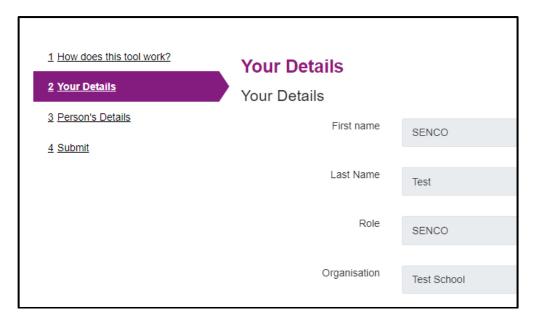


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The first section explains how the portal form works. Click **Next**.

The registered users' details are displayed. Click Next



Remember to save the form regularly and the form can be closed and returned to within 15 days. Each time the form is edited, the 15 days count will be reset.

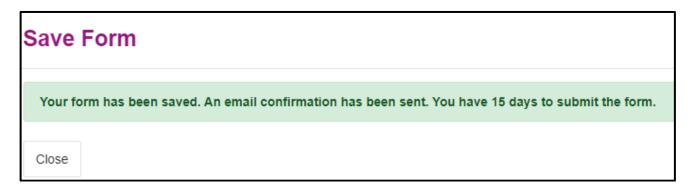
Saving the form

The form doesn't have to be completed all in one go. It can be saved and completed another time.

Scroll to the bottom of the page if not already done so. Click Save for Later



Confirmation that the form is saved will be displayed. It will be saved for 15 days. Click **Close** to remove the message



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The form remains on screen so can continue to be completed and saved on a regular basis.

Click **Close** at the bottom of the form to close the form in order to return to the form at a later date. An email will also be sent to the registered email address confirming that the form has been saved. It can be accessed again via this email.

Recover a Form

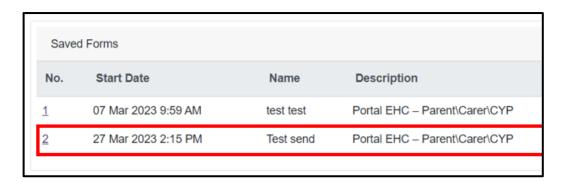
Once a form has been saved, it can be retrieved from the **Recover a Form** section of the portal. The form is saved for 15 days and can be retrieved any time during this time. After 15 days of inactivity and if the form has not been submitted, the form will be deleted and the form will need to be started again.

Log in if not already done so.

Click **Recover a Form** at the top of the screen



All forms will be listed with the oldest first. Click on the form to open it. It will also state how many days are left to retrieve the form.



The form will now open at the screen that was last looked at and the form can be completed as required.

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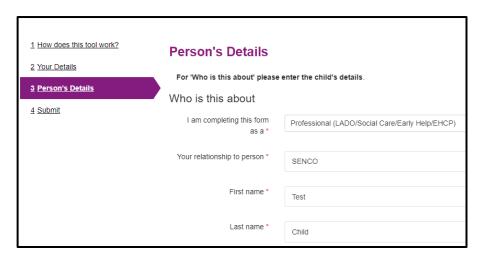


Person's Details

Complete the form. All questions/statements with a red * next to them are mandatory questions that **MUST** be completed before submitting the form.

Select **Professional** from the menu for I am completing this form as

Add role to relationship to person



Complete the child's details. Scroll down the page to see all the boxes

Adding an Address

To add the child's address, type the postcode and then click Find Address



Select the correct address from the list. Click on the drop-down arrow

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Select address *	Select an address	~

Add the Requestor Name (name of school staff sending request) and requestor type of Professional

Requestor Name *	
Requestor Type *	O Parent or Carer (Children Under 16)
	○ Young Person (Over 16 and up to 25)○ Professional

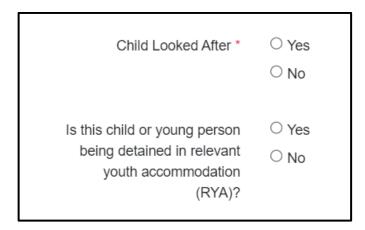
Record whether the child is School Year 12 or above.

Year 12 and Above

If the young person is age 16 or above, the school can still send the request on their behalf.

Under the age of 16

If the child is not year 12 or above, additional questions will be displayed.

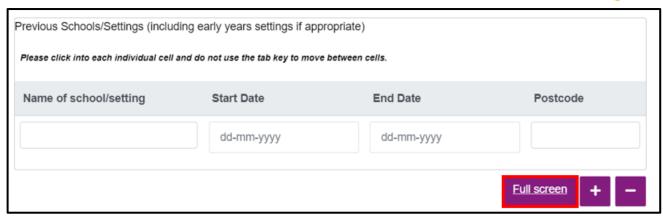


Add details of the child's school in the table provided. To view the table in a bigger screen, click **Full Screen**

Please Note: Please click into each individual box and do not use the tab key to move between boxes

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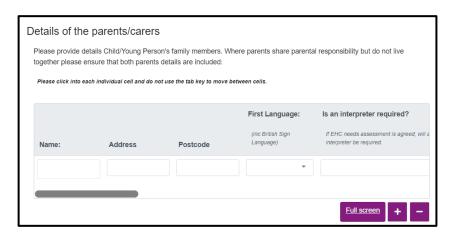




Add details about the school stage and year group using the drop-down arrows where appropriate



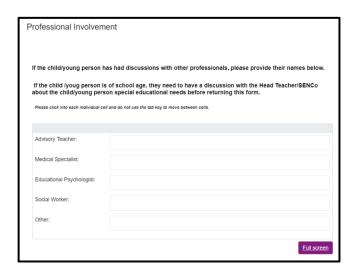
Add details of parents/carers



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Add details of professionals involved:



Click Next

Professional

Complete the Professional section with details of the requestor



Scroll down the screen and click Next



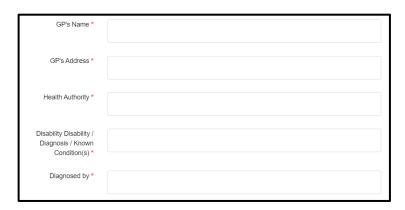
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Family Conversation

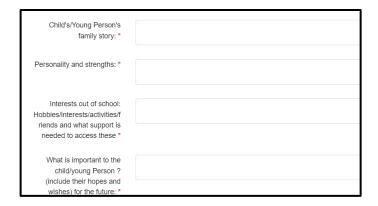
GP Details/Diagnosis

Add details of the child's GP and details of the diagnosis received. If not relevant, please add N/A. Please remember to click into each field, do not use the tab function.



Add details of Social Care involvement and key contact details. Please remember to click into each field, do not use the tab function.

Complete the Child's Story and any relevant sections. Please add N/A if the question is not relevant to the child. All sections with red * are mandatory and must be completed before submitting the form.



What is going well for the Child/Young person and their family

Complete all relevant sections, adding N/A where not appropriate for the child. The text boxes will expand as required.

Health Needs

Add any details of the child's health needs and any concerns you are wanting to raise.

Signatures

The form uses electronic signatures. Please type in **name** and **date** Click **Next**

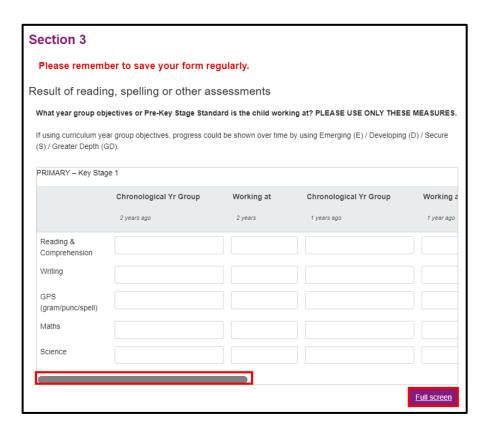
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Section 3

Remember to save your form regularly

Section 3 covers the child's school results. Complete all relevant sections. Scroll across the screen to view all fields in the table. Alternatively, click Full Screen to view the full table. Please remember to click into each field in the table, do not tab across and use the plus icon to add a new row.



Click Next

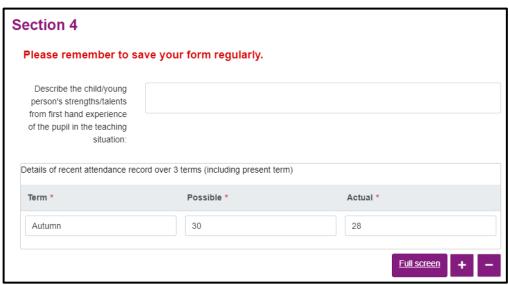
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Section 4

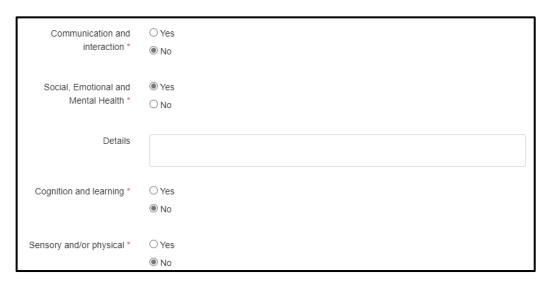
Complete the details regarding the child's strengths/talents and add attendance over 3 terms.

All sections with red * are mandatory and must be completed before submitting the form.



Scroll the screen down to see all sections.

Complete details relating to EHC Needs assessment criteria



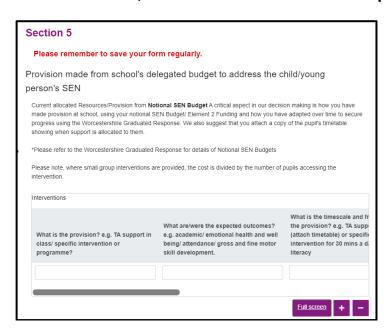
Scroll down the screen and click Next

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Section 5

This section covers provision made from the school's delegated budget to address the SEN needs of the child. Complete all relevant sections. Please remember to click into each field in the table, do not tab across and use the plus icon to add a new row.



Scroll down the page and click Next

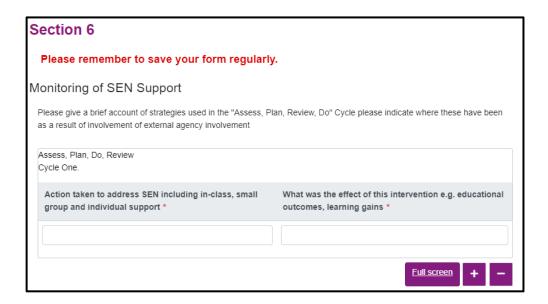
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Section 6

This section covers Monitoring of SEN Support

Complete the details of the Assess, Plan, Review, Do cycle. All sections with red * are mandatory and must be completed before submitting the form. Please remember to click into each field in the table, do not tab across.



To add another line, click on the + or to delete click -



Scroll down to add additional Assess, Plan, Review, Do cycles.

Add a brief chronology of reviews undertaken



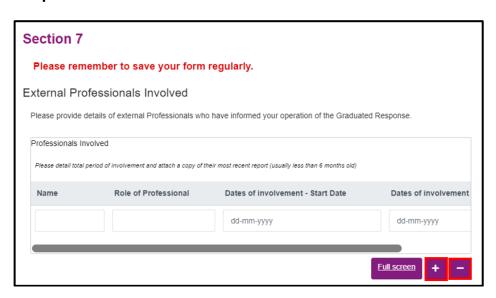
Click Next

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Section 7

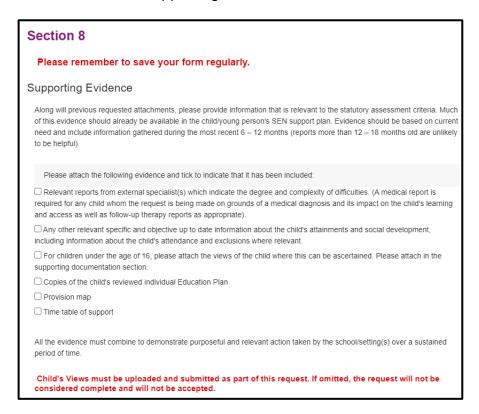
This section is used to record the details of any external professionals involved with the child. Please remember to click into each field in the table, do not tab across and use the plus icon to add a new row.



Click Next

Section 8

This section is where supporting evidence is listed and these documents can be uploaded to the form in the Supporting Documents section



Scroll down the page and click Next

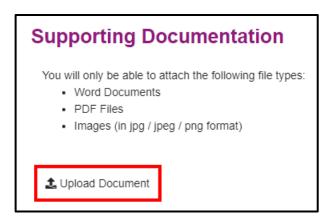
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Supporting Documents

Supporting documents can be uploaded in this section and sent with the request for assessment. The Child's Views must be uploaded and submitted as part of this request. The request will not be considered complete and won't be accepted.

Click Upload Document



Select the file to be uploaded and click Open

The document will be displayed on the screen. Only one document at a time can be uploaded.

The size of some documents maybe too large to submit with the application. If this is the case (and only in these circumstances), please send the additional information only to senassessmentpsf@worcschildrenfirst.org.uk, with the child/young person's name and date of birth.

Click **Upload Document** again to upload additional documents. Repeat as required.

Once all documents have been attached, click Next

Submit

Click Submit to Local Authority to send the form.



Please note that once submitted, changes cannot be made to the form, so please check and amend before submitting.

A warning will be displayed confirming that no changes can be made. Click **Submit**

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The **Thank You screen** will be displayed confirming the form has been submitted. **An email** will also be sent to the registered email address confirming the form has been submitted.



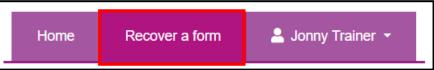
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Viewing and Printing Submitted Forms

Submitted forms are available on the account for **30 days once submitted**. The form can be viewed either by clicking **View Submitted Forms** on the Thank You screen or by clicking on **Recover A Form** at the top of the screen





Click View Submitted Forms



All submitted forms will be displayed in a table, with the most recent first. **Click on the purple writing** to open the form.

Please note that the Portal Response is not being used by the SEND teams, but this does not mean that the request has not been requested.



The form will be opened in **pdf format**. The form can be saved or printed from this point.

Click on the **printer** icon to print or on the **disk** icon to save



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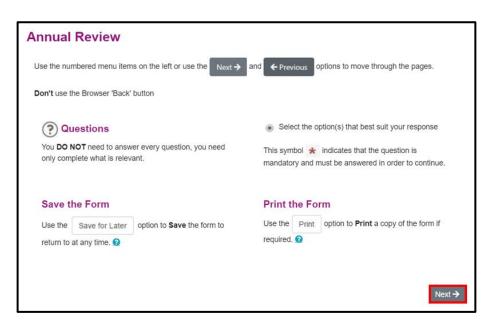


Submitting Annual Review paperwork

Annual Review paperwork can now be submitted via the EHCP Annual Review form accessible from the Children's Portal.

Click on the **EHCP Annual Review Form** link. This will open the form.

Click Next



Your Details

This section is pre-populated with the details recorded for the account logged in. Click Next

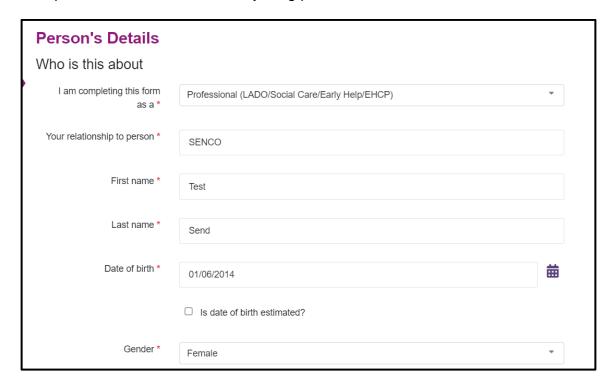


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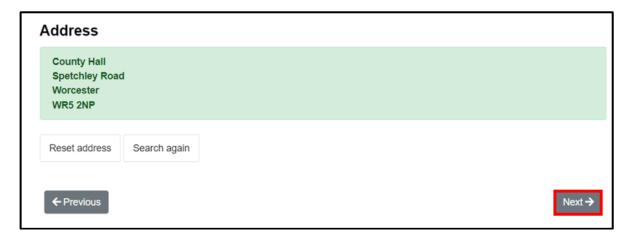


Person's Details

Complete the details of the child/young person that the Annual Review is for



Scroll down the page to add the address. Click Next



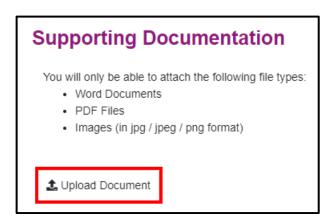
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Supporting Documents

The Annual Review documents can be uploaded in this section and sent with the completed form.

Click Upload Document



Select the file to be uploaded and click Open

The document will be displayed on the screen. Only one document at a time can be uploaded.

For Annual Reviews, please send any oversized documents to either North Area Team (sennorth@worcschildrenfirst.org.uk) for Bromsgrove, Redditch and Wyre Forest or South Area Team (sensouth@worcschildrenfirst.org.uk) for Worcester, Malvern, Wychavon (based on pupils' home postcode).

Click **Upload Document** again to upload additional documents. Repeat as required.

Once all documents have been attached, click **Next**

Submit

Click Submit to Local Authority to send the form.



Please note that once submitted, changes cannot be made to the form, so please check and amend before submitting.

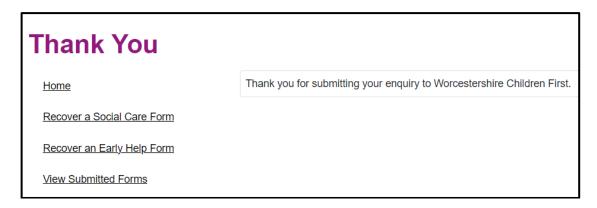
A warning will be displayed confirming that no changes can be made. Click **Submit**

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The **Thank You screen** will be displayed confirming the form has been submitted. **An email** will also be sent to the registered email address confirming the form has been submitted.



The submitted form will be saved for 30 days. The form can also be printed. See <u>Viewing</u> and <u>Printing Submitted Forms</u> section for details on how to do this.

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Delegation Portal

When a parent submits an EHC Needs Assessment Request the Professional section of the request is delegated to the SENCo at the listed school. This is done through the delegation portal. This process also applies when School Consultations are sent prior to Final Plan.

When the section is delegated an email is sent to the registered SENCo email address. It will be from **Worcestershire Children First** and will be called **New Documents**.

Click on the email to open it.

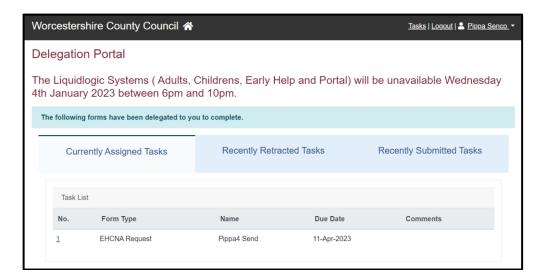
Click on the **Worcestershire Children First Portal link** to access the delegation portal. The email will also state the **date when it should be completed by**



Log into the portal. The login details will be the **registered SENCo email address or work email address**. This is the same as the login used to send EHCNA Requests.

A code will be sent to confirm login. Add this to log in.

The **delegation portal** will be displayed with any documents requiring action listed in the table.

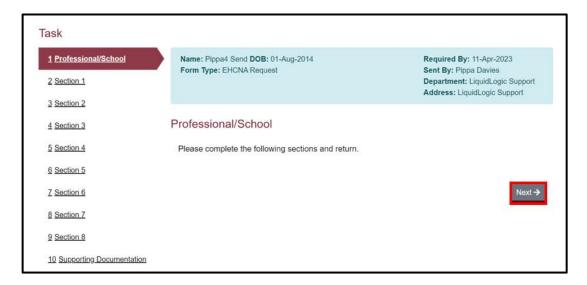


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Click on the form to be completed

The delegated section will be displayed. Work through the sections as appropriate. Click Next to move to the next section.



The form can be saved at any time. Click **Save** at the bottom of the screen.

Section 8 gives details of any Supporting Evidence that can be included. Check the box to identify which documents are included. See the <u>Supporting Evidence</u> section of this guide for further guidance.

These documents can be uploaded via Supporting Documentation. See the <u>Supporting</u> <u>Documents</u> section of the guide on how to upload the relevant documents.

Click Submit Contribution



Submit Form

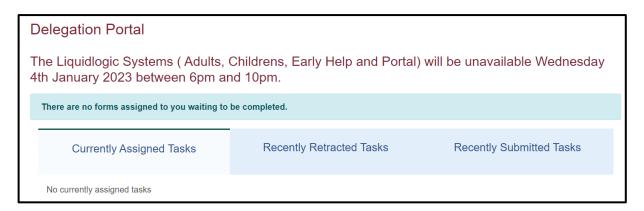
Click **Yes** to confirm that all sections are complete and ready for submission. If this is not the case, click No.



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The form has now been returned to the SEND team and has now been removed from the delegation portal. The submitted form will be available for 30 days in the Recently Submitted Tasks section of the EHM portal



Log out of the delegation portal by clicking on the Logout button in the top right-hand corner of the screen.



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