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School Guide to the new EHC Assessment process

Introduction

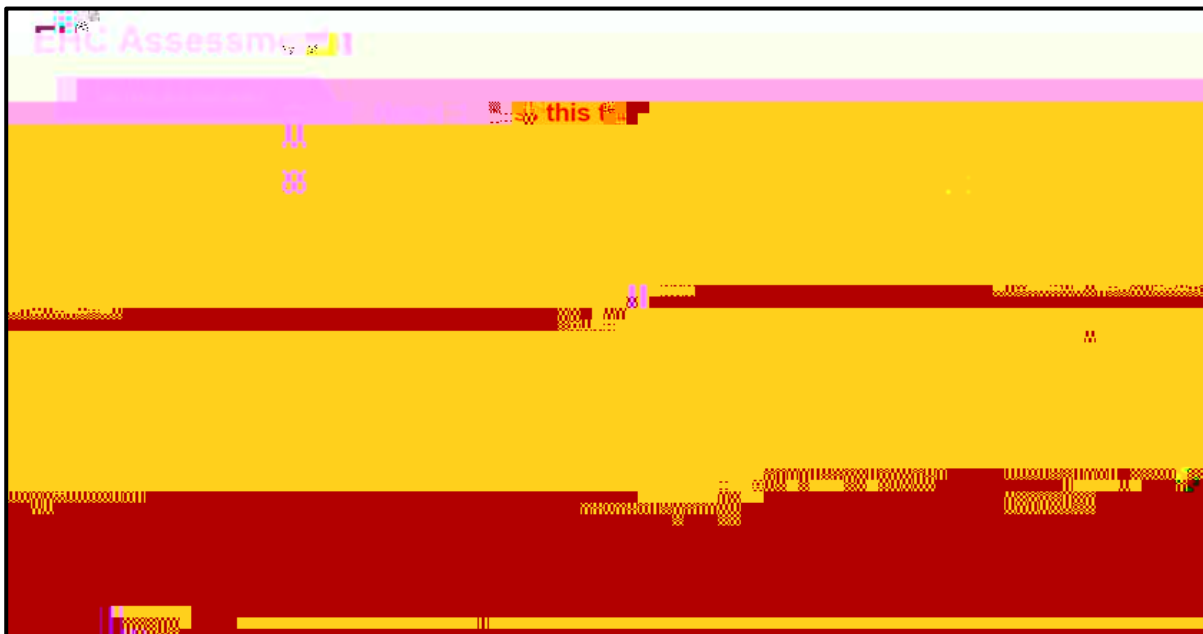
In March 2023 the SEND service moved to using Liquidlogic as a system of recording EHC Needs Assessments, Plans and Reviews. From 17th April 2023 it is expected that all requests for assessment, evidence and information gathering will be completed via the secure Liquidlogic Portal.

Accessing the form

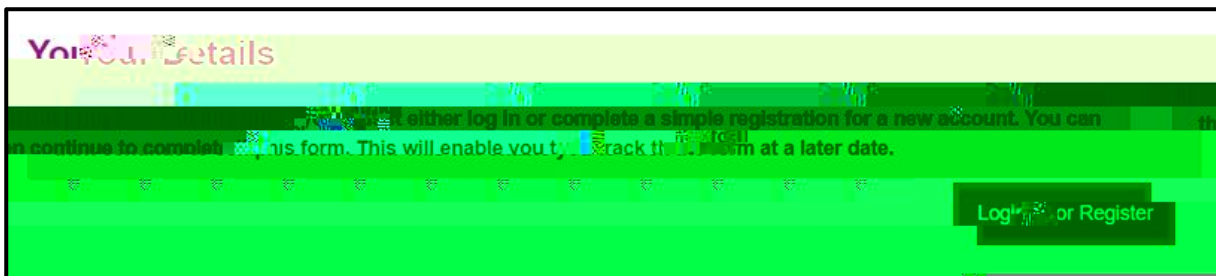
The form is available via the **Children's Portal**. Select **SEND Referral** once logged in.

This will open the EHC Assessment Request form.

Click **Next**



Click **Login or Register**



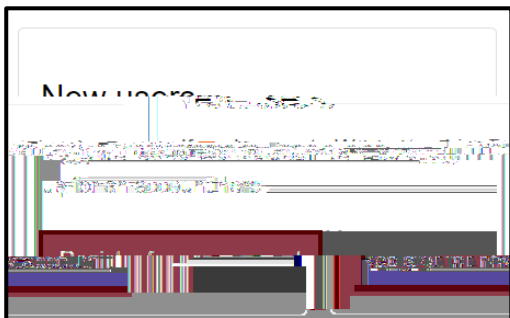
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New User Registration

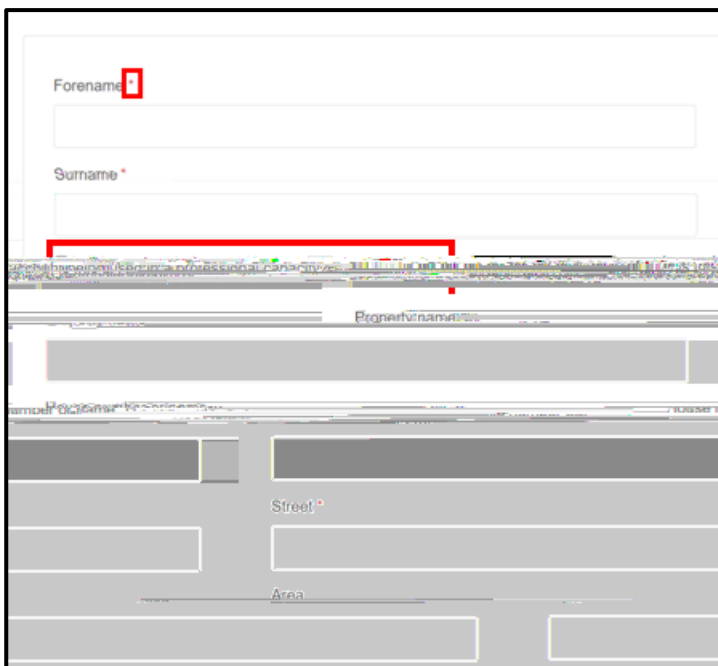
An account is needed to use the system. Please register an account. This will also allow access to view any saved forms or forms submitted within the last 30 days.

Click on **Register for new account**

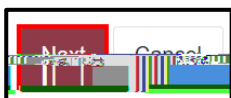


Complete all the details. Any section with a red * is mandatory and has to be completed before the account can be set up. Please tick that this account is being used in a professional capacity.

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



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



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Once the code is entered and checked, click Next

If the code is not recognised, click on

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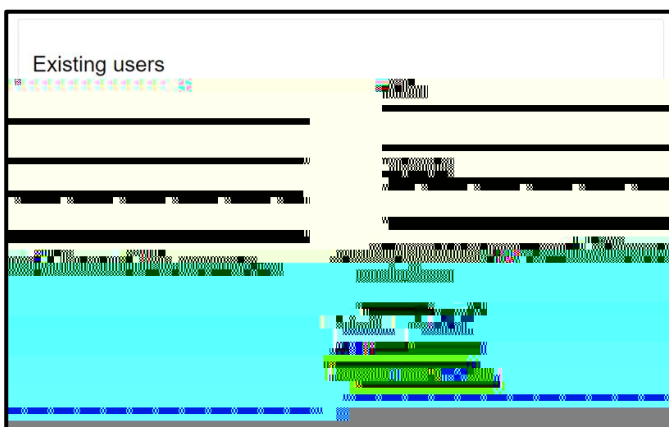
Logging In

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 [Password Policy](#) 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 **Next**

A screenshot of a web form interface. At the top, there are four numbered steps: '1 How does this tool work?', '2 Your Details', '3 Person's Details', and '4 Submit'. Step 2 is highlighted with a purple arrow. Below the steps, there are input fields for 'First name' (containing 'SENCO'), 'Email', and 'Organisation'. There are also 'Test' buttons next to the 'Email' and 'Organisation' fields. The form is partially obscured by a grey overlay.

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

another time.

ed

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

A screenshot of the bottom of the form showing five buttons: 'Print', 'Save for later', 'Create PDF', 'Close', and 'Cancel'. The 'Save for later' button is highlighted with a red border.

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

A screenshot of a confirmation message displayed in a purple box. The message reads: 'Your form has been saved. An email confirmation has been sent. You have 15 days to submit the form.' Below the message, there is a 'Close' button.

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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

. Scroll down the page to see all the boxes

Adding an Address

To add the address, **type the postcode** and then click **Find Address**

Select the correct address from the list

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Add details about the

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Family Conversation

GP Details/Diagnosis

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.**

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

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Section 3

Remember to save your form regularly

Complete the table in Edit mode. Scroll across the screen to view all fields in the table. Alternatively, click Full Screen to view the full table.

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Section 5

This section covers provision made from the 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**

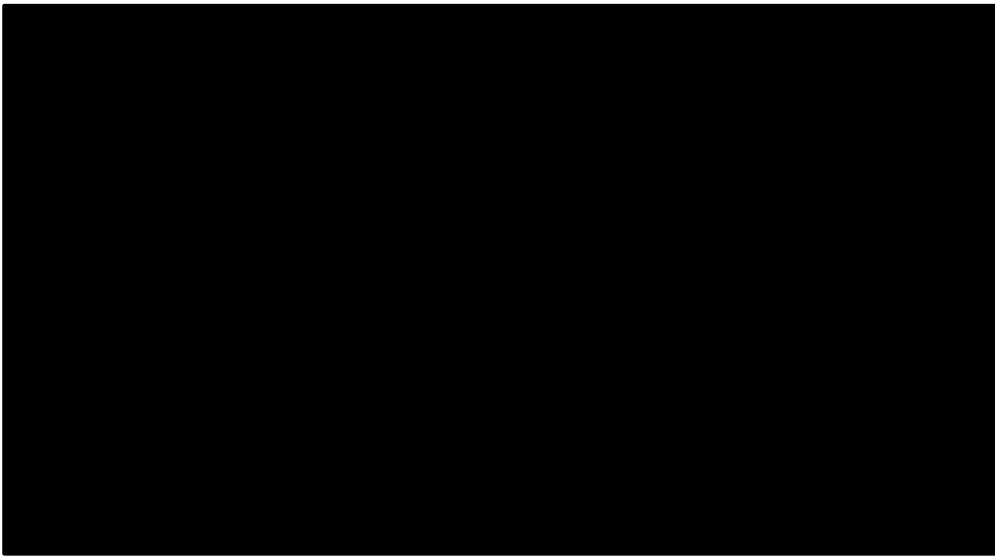
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Section 6

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.

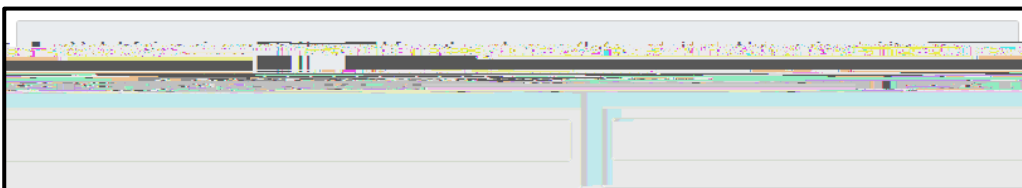


To add another line, click on the + or to delete click



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

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Supporting Documents

Supporting documents can be uploaded in this section and sent with the request for assessment

The request will not be considered complete .

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

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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

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Submitting Annual Review paperwork

Annual Review paperwork can now be submitted via the EHCP Annual Review form accessible from

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

A screenshot of a web form titled 'Person's Details'. The form contains several input fields and dropdown menus. Visible fields include a name field with 'asa' entered, a relationship dropdown with 'Your relationship to person' selected, a 'Last name' field with 'Smith' entered, and a 'Gender' dropdown with 'Female' selected. There is also a checkbox for 'Is date of birth estimated?' which is currently unchecked. The form is partially obscured by a grey overlay.

Scroll down the page to add the address. Click **Next**

A screenshot of a web form titled 'Address'. The form shows a search for 'County Hall' in 'Worcester'. Below the search results, there are two buttons: 'Reset address' and 'Search again'. The form is partially obscured by a grey overlay.

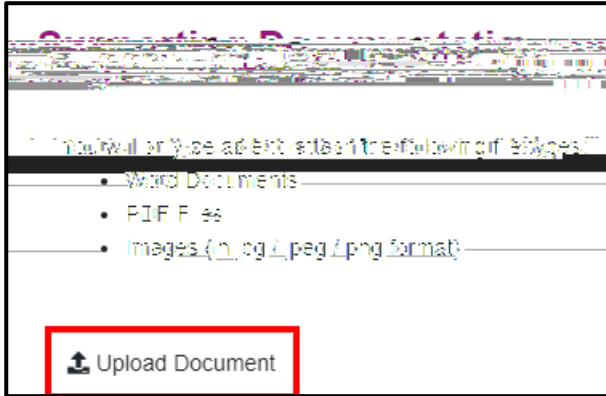
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Supporting Documents

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.

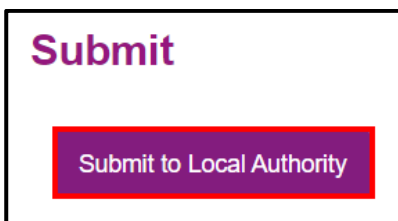
For Annual Reviews, please send any oversized documents to either North Area Team () for Bromsgrove, Redditch and Wyre Forest or South Area Team () for Worcester, Malvern,

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

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

Submit

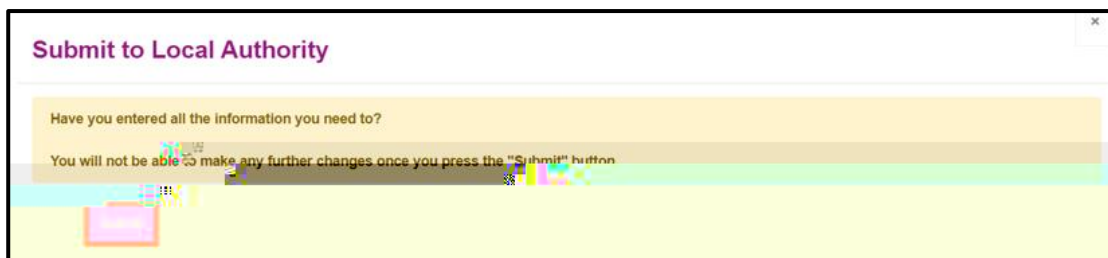
Click **Submit to Local Authority** to send the form.



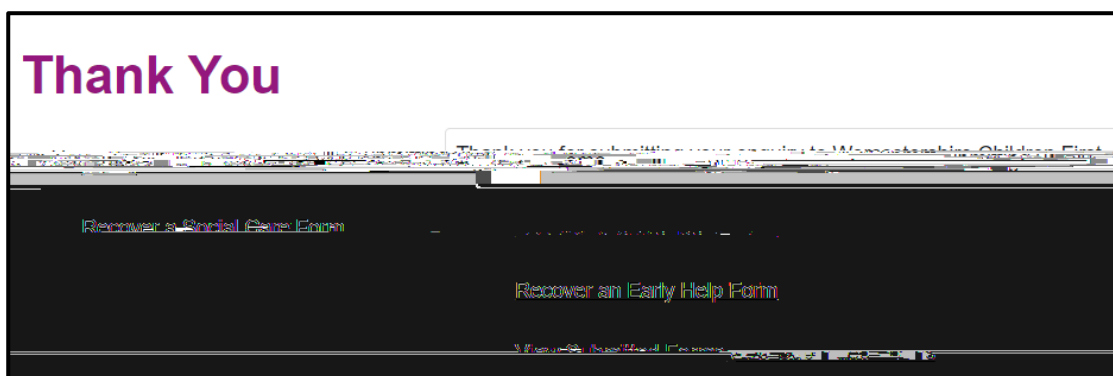
Please note that once submitted, changes cannot be made to the form, so please check and amend before submitting.

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 [Viewing and Printing Submitted Forms](#) 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.

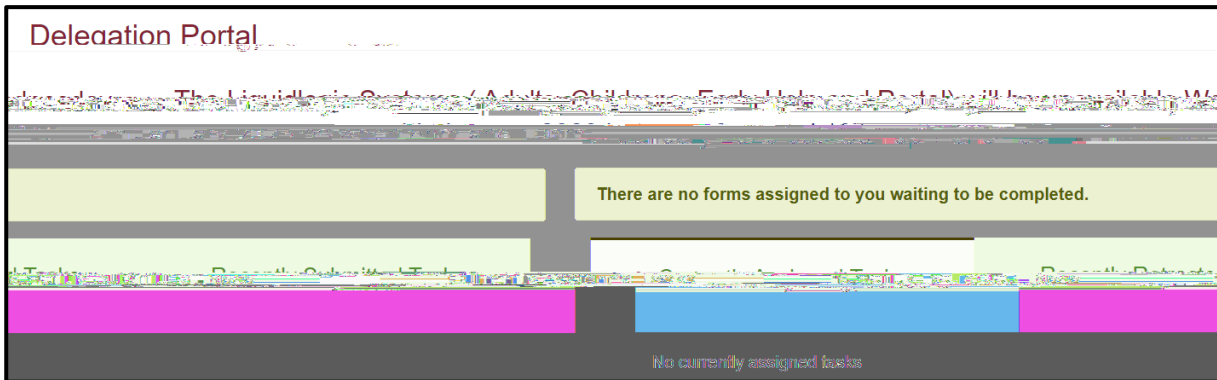
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The form has now been returned to the SEND team and has now been removed from the delegation portal. The submitted form will be available for 30 days in the Recently Submitted Tasks section of the EHM portal



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

