

Generic information to guide you through processes in the SEND system. More specific guides for schools and the SEND team are available.

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Logging on / first steps

To log onto the system, please click on the following link if you are on a Knowsley network:

<http://kmbclcsdev:13020/web/pages/home>

And this link if you are outside the Knowsley network:

<https://ehm.knowsley.gov.uk>

Enter your username carefully. Note: if you put the wrong one in, you'll still be prompted for a password.

You'll be prompted for 3 random characters from your password.

Sign In

Secret Question: a







OK Cancel

The secret answer is the same as the question. In the example below the answer would simply be the letter a.

You'll be prompted to change your password the first time you log in or if you've requested a password reset.

Important points to remember:

- The 'tiles' screen which you see when you first log in, is NOT your homepage. Please click on the HOME menu or the Liquidlogic logo to access this.
- **BEFORE you raise a request for a child to be assessed for an EHCP, you must check the child/young person's DEMOGRAPHIC record is up to date** - this information pulls into your form
- **Check the symbols that appear next to a child's name.** It was highlighted during training that if any of the following aren't crossed out, then the case will be open to either a Social Worker, Early Help Co-ordinator or Family First Officer and **they are responsible for keeping that record up to date.** Therefore, you should inform them of any changes that need to be made to a child's record before you proceed with your Form K/request form.

Level 2 Early Help 	Level 3 Family First 	Child in Need 	Child Protection 	Child Looked After 	Child in Need – short breaks 
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If there are no symbols or the above are all crossed-out, then you are fine to update that child's demographic record.

- Any field in red text is a mandatory field and **must be** completed.

Top level menus

HOME	Any tasks you have open will be available from your worktray. Remember: if you click on the child's name, it'll take you to the demographic record. If you click on the task, it'll take you to a specific task/form. Hover over any symbols to find out more.
TILES	A customisable area, where you can refer back to cases and forms that you've recently viewed.
MENU	The useful links area can be found in here.
FIND	This is where you search for a child, young person, or family member.
TOP RIGHT MENU	Hover over your name to view the menu. Here you can find the address book ; your account information , visual settings and where to logout.

-When you log in for the first time, it is advisable to check and update your account information. This is what others see when they search for you.

-Remember to click the pencil symbol to edit.

-Check your name / job title & email address.

How to add your phone details:

-Add your phone number by clicking 'update contact number(s)'.

-Click **New Contact** button

-Click on the **Type** drop-down box. Select the appropriate option

-Put your number in the **Contact Detail** field.

-Tick **primary contact** if this number is the best way of contacting you.

-Click **create record**

-Click the **close** button

The screenshot shows a user profile page for Debbie Jones EHM Admin. The page is divided into several sections: Professional Details, Profile, Identifiers, Telephones, Languages Spoken, DBS checks, Picture, and Actions. Red circles highlight the pencil icon for editing in the Professional Details section, the 'Contact' button in the Telephones section, and the email address field in the Telephones section.

The screenshot shows the 'New Telephone' form for Debbie Jones EHM Admin. The form has a 'Create Record' button, a 'New Telephone' input field, a 'Type' dropdown menu, and a 'Contact Detail' input field. Red circles highlight the 'Create Record' button, the 'Type' dropdown, and the 'Contact Detail' field. There is also a 'Primary Contact' checkbox and 'Start Date' and 'End Date' fields.

Address book

The screenshot shows the 'Address Book' application. At the top, there is a title bar with 'Address Book' and three buttons: 'Previous', 'Bookmark', and 'Close'. Below this is a navigation sidebar on the left with four tabs: 'My Contacts' (selected), 'All Professionals', 'All Departments', and 'All Groups'. The 'All Professionals' and 'All Departments' tabs are highlighted with red boxes. The main content area is divided into two sections: 'Manager Contacts' and 'Bookmarked Contacts'. The 'Manager Contacts' section shows a list of roles: 'Debbie Jones EHM Admin', '(Yourself)', 'EHM Admin Officer', and 'EHM'. The 'Bookmarked Contacts' section shows a list of names and roles: 'April Wa...', 'Carmel S...', 'Caroline...', 'SEND', 'Early Help Coordinator', 'Early Help Assessment Manager', 'SEND Team', 'Early Help L2 Team', and 'Family First Two'.

There are 4 tabs on the left hand side:

- **'My contacts'** is where you can see professionals and organisations that you've bookmarked or recently searched for.
- **All Professionals** is where you search for professionals that are working with a child or young person, particularly used when adding a **Key Agency**.

Note: consider this a directory. Not everyone listed is necessarily a user of the system.

*If you cannot find whom you are looking for, **despite using your wildcards i.e. %**. **You will need to log a helpdesk call to get this person added.***

- **All Departments** is where you search for organisations including Schools, Council Services, GP surgeries, Nurseries and so on.
- **All Groups** – please note you won't need to use this area.

*****IMPORTANT: REMEMBER TO USE YOUR WILDCARDS*****

Searching for a professional and searching for a department

From within the record you are dealing with you will need to search and add Professionals and Departments

Searching for a Professional – click on the Professional link

Here is an example of a question within a form that links to the address book.

Professional or Agency making contact

Contact email

Select a User, Department or Group

Address Book

- My Contacts
- All Professionals
- All Departments
- All Groups

Manager Contacts

Gill Winstanley-Bell EHM Admin (Yourself) EHM

Bookmarked Contacts

Recent Contacts

Gill Winstanley-Bell EHM Admin EHM

In this example I am searching for Radha Wilkinson – Select All Professionals

Select a User, Department or Group

Address Book

- My Contacts
- All Professionals
- All Departments
- All Groups

Search Professionals

Professional Name

Surname

Forename

Professional Details

Job Title

Staff Type

Active Status

Professional Identifiers

Unique ID

Login ID

This will display all Wilkinsons1 within ICS/EHM

See screen shot below

The screenshot shows the 'Search Professionals' interface. At the top, there are buttons for 'Previous', 'Bookmark', and 'Cancel'. Below this is a search bar with a magnifying glass icon and the text 'Search Professionals', along with 'Back' and 'Printable View' buttons. On the left, there is a sidebar with 'Address Book' and a list of categories: 'My Contacts', 'All Professionals' (highlighted), 'All Departments', and 'All Groups'. The main area displays 'Query Results (19)' in a table with columns for 'Full Name', 'Job Title', and 'Dept'. The results list 19 professionals with the surname 'Wilkinson' and their respective job titles and departments.

	Full Name	Job Title	Dept
1	Dr . Wilkinson	General Practitioner	General Practitioner
2	Dr Wilkinson	General Practitioner	MANOR HOUSE SURGERY
3	Elaine Wilkinson	Education	Mosscroft Primary School
4	Mr Philip Wilkinson	Social Worker	Ad - Physical & Sensory Servic
5	Mr Steve Wilkinson	Social Worker	Youth Offending Service
6	Mrs Angela Wilkinson		Z - Other
7	Mrs Barbara Wilkinson		Z - Unknown
8	Mrs E Wilkinson	Home Help	AD - Kirby and West Locality Team
9	Mrs Elizabeth Wilkinson		OPUS PROVIDER NORTH
10	Mrs Gladys Wilkinson	Other Worker	Z - Unknown
11	Mrs Lorna Wilkinson		Z - Unknown
12	Mrs Margaret Wilkinson		Z - Unknown
13	Ms Kelly Wilkinson	Assistant Head Teacher	PONTVILLE RESIDENTIAL SCHOOL
14	Ms Kerry Wilkinson	Other Worker	Z - Unknown
15	Ms Lisa Wilkinson		OPUS PROVIDER NORTH
16	Ms Sue Wilkinson	Interim Head Of Service	1. ARCHIVED SOCIAL WORKERS/TEAMS
17	Radha Wilkinson	SEN Officer	Education Development Centre
18	Rhada Wilkinson	Other Worker	Education Development Centre
19	Sue Wilkinson-ICS	SQUA	Archive

But we can narrow this down by completing more fields and using wild cards e.g. %

Click the **Back** button to return to your search criteria.

The screenshot shows the 'Search Professionals' interface with search filters. At the top, there are buttons for 'Previous', 'Bookmark', and 'Cancel'. Below this is a search bar with a magnifying glass icon and the text 'Search Professionals', along with 'Reset' and 'Search' buttons. On the left, there is a sidebar with 'Address Book' and a list of categories: 'My Contacts', 'All Professionals' (highlighted), 'All Departments', and 'All Groups'. The main area displays search filters for 'Professional Name', 'Professional Details', and 'Professional Identifiers'. The 'Professional Name' section has fields for 'Surname' (value: wilkinson) and 'Forename' (value: rad%). The 'Professional Details' section has fields for 'Job Title', 'Staff Type', and 'Active Status'. The 'Professional Identifiers' section has fields for 'Unique ID' and 'Login ID'.

This narrows the search down – see screen shot below

The screenshot shows the Liqidlogic EHM UPGR interface. At the top, there is a purple header with the logo and text. Below the header, there is a navigation bar with the text "Select a User, Department or Group" and buttons for "Previous", "Bookmark", and "Cancel". On the left, there is a sidebar with an "Address Book" section containing "My Contacts", "All Professionals", "All Departments", and "All Groups". The "All Professionals" option is highlighted. In the main area, there is a search bar with a magnifying glass icon and the text "Search Professionals", along with "Back" and "Printable View" buttons. Below the search bar, there is a table titled "Query Results (1)" with the following data:

	Full Name ▲	Job Title	Dept
1	Radha Wilkinson	SEN Officer	Education Development Centre

Double click Radha Wilkinson and then confirm

The screenshot shows the Liqidlogic EHM UPGR interface with the details for Radha Wilkinson. The navigation bar now includes a "Confirm" button. The sidebar shows "Radha Wilkinson, SEN Officer" highlighted. The main area displays the details for Radha Wilkinson, SEN Officer. The details are organized into sections: "Professional Details", "Profile", and "Contact Details".

Radha Wilkinson, SEN Officer

Professional Details

Core System ID	155893
Staff No	13946
Full Name	Radha Wilkinson
Department	Education Development Centre
Job Title	SEN Officer
Staff Type	Other Worker

Profile

Active Status	Not On System
Security Profile	NON ICS USERS

Contact Details

Picture

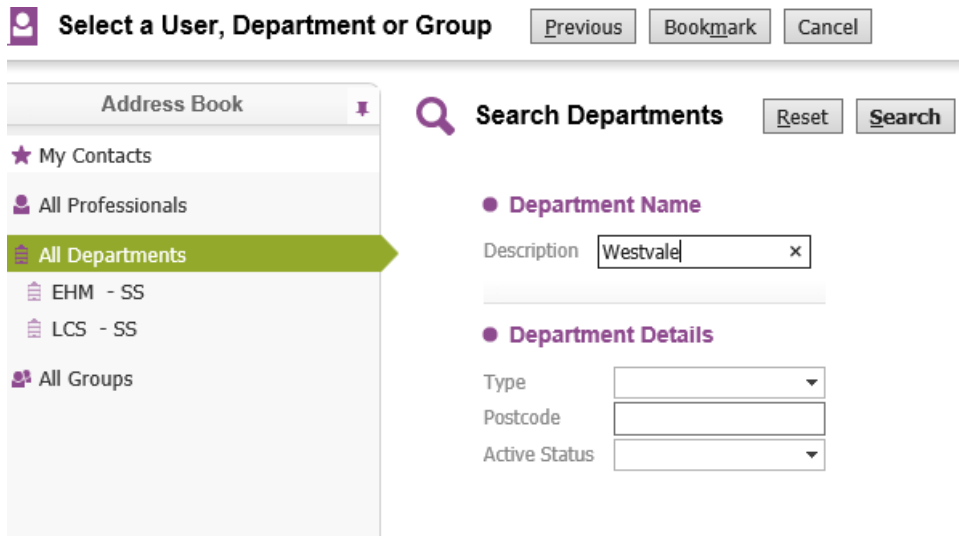
Actions

- Open Full Record

If you cannot find the Professional you will then need to log a call with IT to have this professional added to ICS/EHM

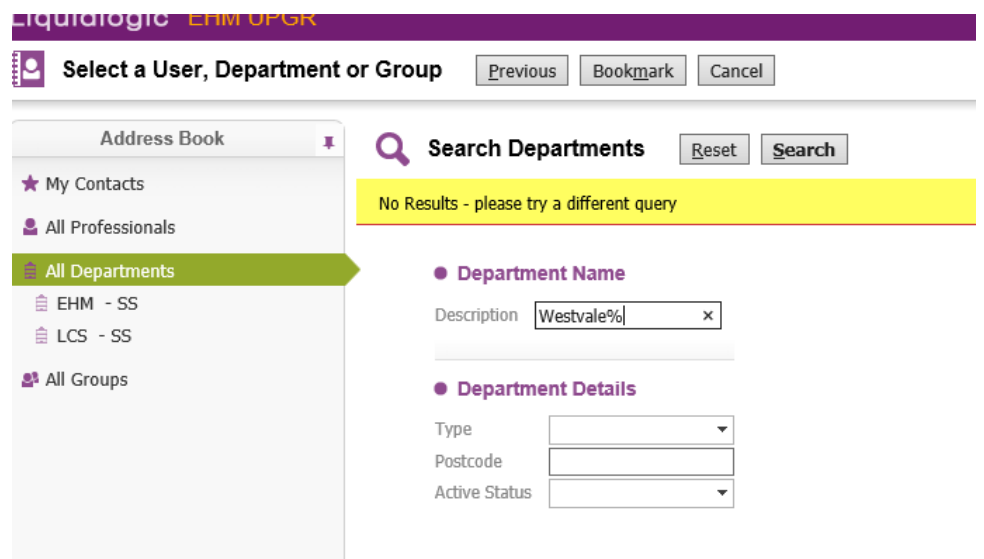
The process is exactly the same when searching for Departments

In the example below we are searching for Westvale Health Centre



This has brought back No Results

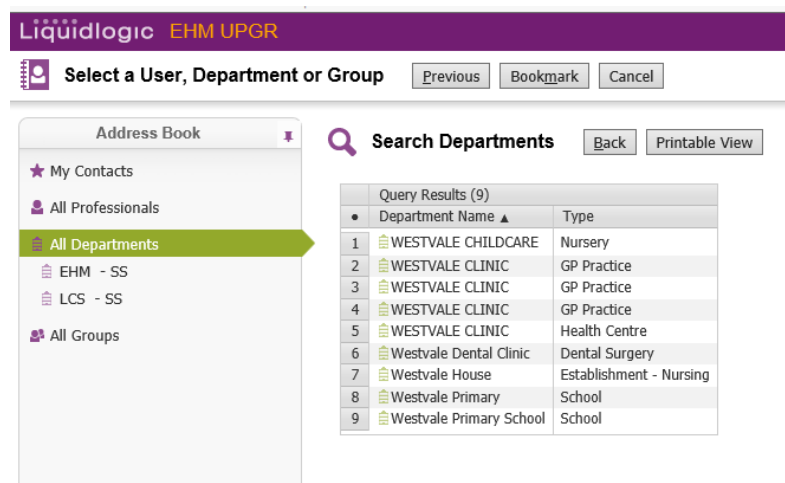
By adding a wildcard after Westvale %



This has brought back the following results showing Westvale Health Centre

If you find more than one result, hover over the name of the organisation and select the one with an address

Click on the relevant result



Select Confirm


Select a User, Department or Group Previous Bookmark Confirm Cancel

Address Book

- My Contacts
- All Professionals
- All Departments
- LCS - SS
- Gp Practice... - 2807
- HEALTH CENTRES - Health Centre
- WESTVALE CLINIC - Health Centre
- All Groups

WESTVALE CLINIC - Health Centre

Department



Actions

- ▶ New Professional
- ▶ Dept Maintenance
- ▶ Move Department

Department Details

Type	Health Centre
Description	WESTVALE CLINIC
Active Status	No Longer Active

Address

Address	Westvale Health Centre Hesketh Drive Westvale Kirkby MERSEYSIDE
Postcode	L32 0TZ

SEND GENERIC INFORMATION V1

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Searching for a child / young person / family members / using wildcards

Please follow the steps below:

Click on Find



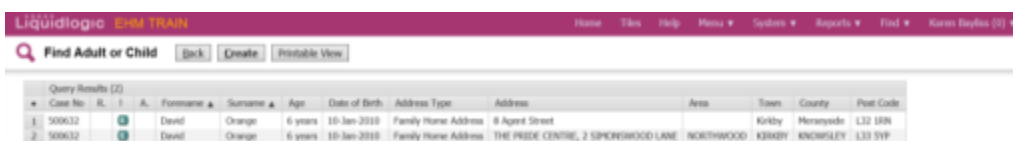
Always select Reset prior to any new search



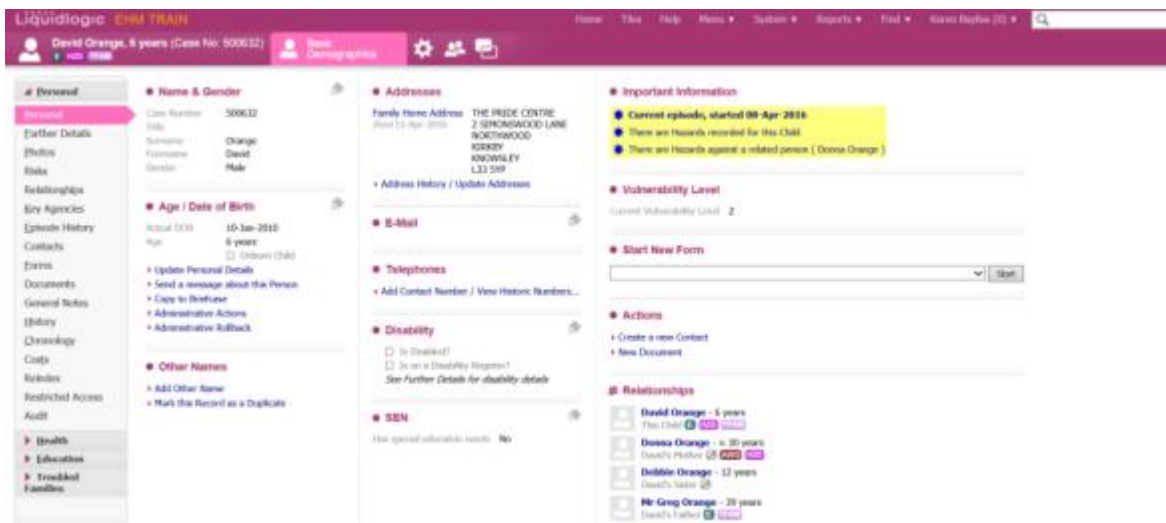
Enter the person's details (the most effective fields to use are the surname and forename). **ALWAYS** use the wildcards (%) to ensure a thorough search is completed.



If an adult/child exists on the system with the details you entered, or with similar details you will receive results



If the person you are looking for is in your list of results, click on the row and it will take you to the record



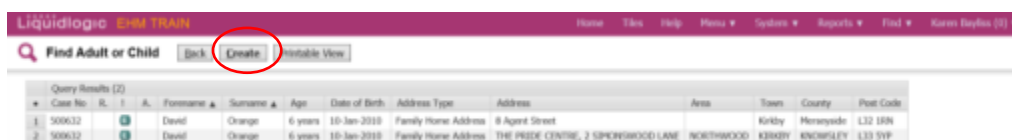
If you cannot find the person or are not sure of the spelling of a name you can search using a wildcard. Use % at the beginning and at the end of your search criteria. e.g if we wanted to search for Claire but we were unsure of the spelling we could search for %cla% and this would bring back all names that begin with 'cla'.

How to create a person / child once a search has been completed

Follow the above steps.

If your search does not return the person you are looking for, try searching by their DOB or address. For example, there may be instances where the person's name may have been spelt incorrectly, or incorrect DOB entered etc.

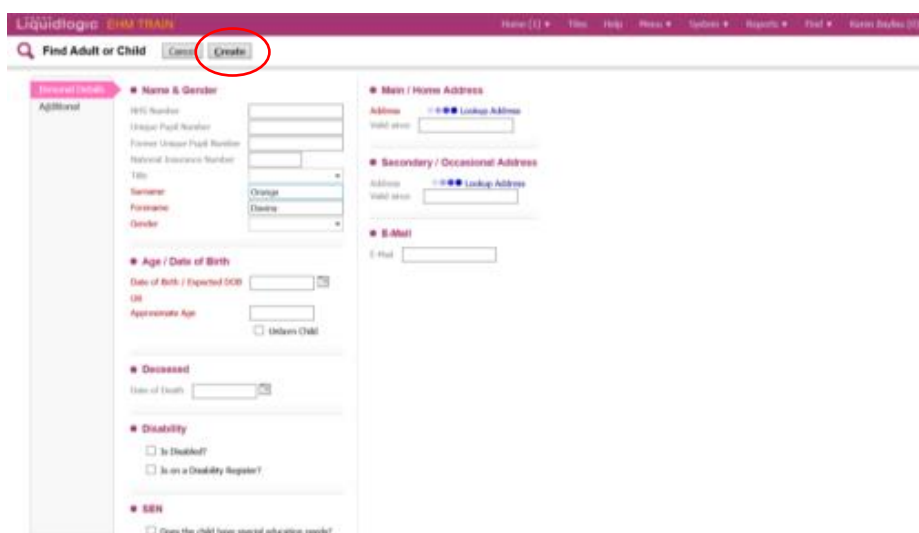
If you still can't find the person you're searching for, you will need to create their record by completing the following.



Case No.	S.	A.	Forename	Surname	Age	Date of Birth	Address Type	Address	Area	Town	County	Post Code
1	500632		David	Orange	6 years	10-Jan-2010	Family Home Address	8 Agent Street		Kirkby	Merseyside	L12 1RN
2	500632		David	Orange	6 years	10-Jan-2010	Family Home Address	THE PRIDE CENTRE, 2 SPURWOOD LANE	NORTHWOOD	KIRKBY	KNOWSLEY	L13 2YF

If you are sure that the person you are looking for is not on the system then click the CREATE/CREATE NEW button.

Complete all the information that you can (All red fields are Mandatory)



Name & Gender

Ag/Birthed

WFO Number

Unique Pupil Number

Former Unique Pupil Number

National Insurance Number

Title

Surname: Orange

Forename: David

Gender: Male

Age / Date of Birth

Date of Birth / Expected DOB

OR

Approximate Age

Unknown Child

Deceased

Date of Death

Disability

Is Disabled?

Is on a Disability Register?

SEN

Does the child have special education needs?

Main / Home Address

Address

Valid since

Secondary / Occasional Address

Address

Valid since

E-Mail

E-Mail

Once you have completed all the relevant and minimal information select CREATE

The mandatory fields are: Surname, Forename, Gender, DOB or Approx. age, Address, Ethnicity

The record has now been created.

Restricted records

A record can be restricted for various safeguarding reasons. If you require access to a restricted record you may still be able to access this record but you must log a call with IT.

Personal tab – demographics

The screenshot shows the 'Personal' tab selected in the left-hand navigation menu. The main content area is divided into several sections, each with a pencil icon for editing:

- Name & Gender:** Case Number 542308, Title, Surname Jones-Send, Forename Debdemo, Gender Female.
- Age / Date of Birth:** Actual DOB 12-Jun-2010, Age 8 years, Unborn Child checkbox.
- Status Details:** Marital Status.
- Other Names:** PREV Debbie Jones-Send, Add Other Name, Mark this Record as a Duplicate.
- Addresses:** Family Home Address from 12-Jun-2010, Davies Ltd, The Bluebell Centre, Blue Bell Lane, Huyton, L36 7XY.
- Disability:** Is Disabled? checkbox, Is on a Disability Register? checkbox, See Further Details for disability details.

Ensure the **'Personal'** tab is selected tab on the left, check the basics, such as:

- Name, Date of Birth, Address, Telephone and Disability

Note: if you change any information via the **pencil symbol**, ensure you click on the **'tick'** box that appears in its place to save your changes

This close-up shows the 'Name & Gender' section with a pencil icon and a 'tick' box. The fields are:

- NHS Number
- Unique Pupil Number
- Former Unique Pupil Number
- National Insurance Number
- Title
- Surname: Jones-Send
- Forename: Debdemo
- Gender: Female

The following fields don't appear until you click on the pencil symbol next to 'Name and Gender' (top right)

- Unique Pupil Number (UPN)
- NHS Number

This close-up shows the 'Name & Gender' section with a pencil icon and a 'tick' box. The fields are:

- NHS Number
- Unique Pupil Number
- Former Unique Pupil Number
- National Insurance Number
- Title
- Surname: Jones-Send
- Forename: Debdemo
- Gender: Female

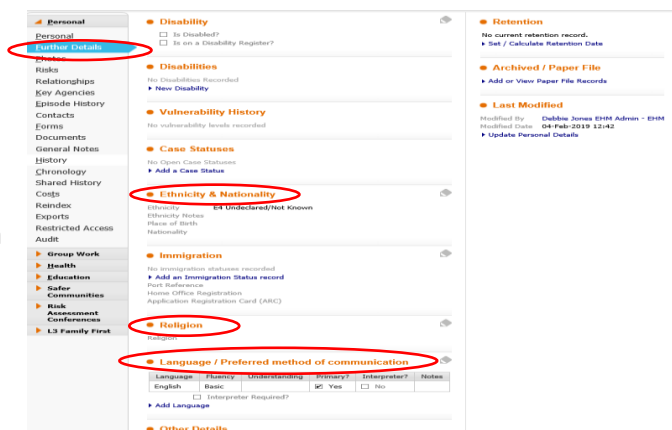
Further details tab

Further Details tab, will allow you to update:

Ethnicity and Nationality

Religion

Language / Preferred Method of Communication



Fields can be amended by clicking on the pencil symbol and selecting the appropriate drop down option. Then clicking on the 'tick'.

Relationships



Ensure that at least one linked person has Parental Responsibility

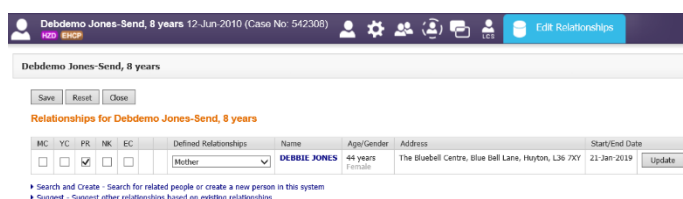
The **Relationships** tab enables you to link or view other people related to the child/young person.

If the PR flag shows against someone with Parental Responsibility, then it will pull his or her details into the Request form (Form K).

If the **PR** flag isn't showing against any of the linked family members:

Click the 'Edit Relationships' link (highlighted in previous image). This displays who is already linked via 'relationships'.

If the person(s) with parental responsibility are not ticked via the PR box. Put a tick in the box alongside their name and click the save button. Then click the close button.



Adding key agencies

Key Agencies show all services, organisations and professionals who are involved with the child. This information pulls into your EHCP Request form.

It is strongly advised that you update the relevant education establishment/school, prior to starting your EHCP Request Form.

Click on new Key Agency

Type	Person / Department / Organisation	Start Date
School	Westvale Primary	01-Mar-2019

▶ Show Ended Key Agencies
▶ New Key Agency

Complete the Mandatory fields as below – Type and Start Date – you must also enter the Department (*if you don't you will be prompted*) e.g. below, we have selected Westvale Primary – then click Create

Other Name

Type: School
Person:
Department: Westvale Primary
 End Previous Type
 Mark as Social Care Involvement?
 Sensitive Service

Effective Date

Start Date: 01-Mar-2019
End Date:
Comments:

Copy To

Other Relations
 Test2 Child (2 years)
 Sgo Uncle (≈ 36 years)
 Sgo Auntie (≈ 36 year)

[All Key Agencies](#)

Now you need to go into Education displayed on the left-hand menu

Then click on Add a new school Record


Select the appropriate radio button to choose your school from the options

Establishment	Started On	Ended
Westvale Primary	01-Mar-2019	

[Add a new School Record](#)

Printing Forms from ICS and EHM

Printable Views

From within LCS / EHM, select the **Printable View**  option from a form, the printable view customisation screen appears with options to select various options within the printing menu (see below).

Select the checkboxes as required and then click the **Print Request** button to print the preview of the form. Always remember to think about the person who you will be giving the form to and select the appropriate options from the menu.

Example: A parent may require a different printed version of the form that a Professional involved in the case.

Think / Read / Print / Read before distributing the form

Configure Printable Style of Record

Use Large Font

Print Landscape (remember)

Print For Paper Form Fill

Show question IDs

Configure What to Print

Print Service User Details

Reduce Service User Details

Hide Address from Service User Details

Print Guidance Notes

Print Multi line answers beneath the Question

Configure Sections to Print

Print Current Heading Only

Select Headings to Print

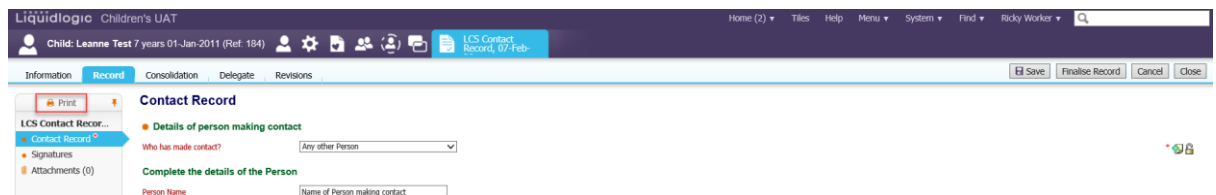
Explanations of the Print Options above:

Use Large Font	Allows the form to print in a larger font size from standard
Print Landscape	Allows the form to print in a landscape orientation rather than portrait. Liquidlogic recommend that the printer orientation is changed to landscape also. When printing a plan this will automatically default to print as landscape rather than portrait
Print for Paper Form Fill	Will increase the size of the text box against a question allowing the user to print an assessment from LCS, complete it by hand on site then return to enter details into LCS
Show Question ID's	This option is only available when the correct Profile right is assigned. It will show all the fields question ID's that have been set using Form Designer.
Print Service User Details	This option is always selected as default, as LCS assumes the print out will include the subject's details (e.g. name address, DOB etc)
Reduce Service user details	When used in conjunction with "Print Service User Details" this option will reduce the user details down to; Family name, Given name and Case number.
Hide Address from service user details	This will remove the primary and current address from the printable view.
Print Guidance Notes	This option is always deselected as default. If selected the grey extra text for questions, where present will also print out

Print Feedback Record	If selected, the Feedback tab will be included in the Printable View. This is only applicable to forms which contain a Feedback tab
Print Multi Line answers beneath the Question	When dealing with questions that contain a lot of text. This option can be used to move the question caption above the answer allowing for more space when printing.
Print Current Heading Only	This option will print only the heading or section that is currently selected and displayed in the actual assessment
Select Headings to Print	This option will enable the user to select which headings or sections to print from the actual assessment

Printing from a Form within ICS / EHM

- From the form, e.g. the contact record click **Print**



- Specify the printable view options as required

Configure Printable Style of Record

- Use Large Font
- Print Landscape (remember to manually change the printers paper orientation to landscape)
- Print For Paper Form Fill

Configure What to Print

- Print Service User Details**
- Reduce Service User Details
- Hide Address from Service User Details
- Print Guidance Notes
- Print Feedback Record
- Print Answered Questions Only
- Print Multi line answers beneath the Question

Configure Sections to Print

- Print Current Heading Only
- Select Headings to Print

Configure Sections to Print option

It is possible to select different heading within the form see below.

Configure Sections to Print

- Print Current Heading Only
 - Select Headings to Print**
- Heading selection options:
- Single Assessment
 - Additional Information
 - Consent
 - Assessment
 - Social Work Analysis
 - Factors Identified at the end of Assessment
 - Recommendations following the Single Assessment
 - Basic Information
 - C & F Plan
 - Plan Summary
 - Childs Developmental Needs
 - Parental Capacity
 - Family and Environmental Factors
 - #AttachmentsDescAll

A number of options are available to print, please tick the options you require

Configure Sections to Print

- Print Current Heading Only
 - Select Headings to Print**
- Heading selection options:
- Single Assessment
 - Additional Information
 - Consent
 - Assessment**
 - Social Work Analysis**
 - Factors Identified at the end of Assessment
 - Recommendations following the Single Assessment**
 - Basic Information
 - C & F Plan
 - Plan Summary**
 - Childs Developmental Needs
 - Parental Capacity
 - Family and Environmental Factors
 - #AttachmentsDescAll

3. Click **Print page now** to print, alternatively to produce the form as a PDF document click on the **Adobe** icon. Click **Close Printable View** to return to the contact record



Note:

If you are unsure on any aspect of the printing process please speak to your manager before printing out any information from ICS or EHM.

Before printing any information from ICS or EHM make sure you have a printer mail box set up on the Printer within your office for secure confidential printing.

Logging a call

If you can access the Knowsley Network and you need to log a helpdesk call:

Please click on the following link: <http://sharepoint.knowsley.gov.uk/sites/itss/sitepages/home.aspx>

Click on Software > Business Systems > EHM > then choose your issue

If you cannot access the Knowsley Network, please use the following email address:

servicedesk@knowsley.gov.uk

Remember, not to identify children/families by name, always use their case ID number