SEND Portal - Implementation Package

Professional Services

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Contact

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Contents

Introduction

The MRI Education SEND Portal enables the Local Authority to provide a means for Parents, Young People and Professionals to:

- Contribute to Education Health and Care Plans

- Request an assessment, and/or

- Contribute to the assessment process.

- Gathering the Views of the Young Person and/or Family

- Feedback as part of the Draft Plan creation process

- Sharing Documentation including the EHCP document itself and any advice that has been submitted

- Annual Review Data Collection

Local Authorities can expose specific Forms created within Form Builder over a secure Portal. Allowing non- MRI Education users to submit information that can be added to the rest of the content of the child/young person's plan or form part of an assessment.

Authorities can create as many Forms as they need to collect any relevant information to support the EHC/SEND process. LAs could also choose to publish an 'assessment request' form to parents and/or schools, allowing assessment requests to be made online.

We recommend all sites take up this implementation service as a minimum. This ensures your SEND team implements the SEND Portal successfully at the basic level. Additional options available allow Local Authorities the opportunity to review their use of the SEN module, ensuring the implementation is maximising benefits for users and are supported in achieving this.

Please Note - teams not using or familiar with the Form Builder functionality require additional services to effectively make use of the SEND Portal implementation service.

Pre requisites

Your MRI Education Project Manager will discuss the pre-requisites for this project in detail with you at the outset of the implementation and ensure that they are in place for the relevant sessions. There is no requirement for a minimum 3.68 release to be applied before Session 1, however, this will be required for all subsequent sessions. This ensures access to the latest elements of the SEND Portal introduced with that release. Sites require licenses for the following:

- SEND Citizen Portal

- SEND Professional Portal

- Generic Citizen Portal

The delivery of this Service assumes sites are already comfortable with the Form Builder functionality released in 2014 as part of the SEND changes to the software. Additional services are available to introduce this area of the system as part of the implementation of the SEND Portal. If required these need to be delivered towards the beginning of the project to ensure the implementation provides the greatest benefit to the team. Your MRI Education Project Coordinator will assist you in planning the delivery of all the sessions, including any Additional Service Options.

Overview of SEND Portal Functionality

Publish Forms

- New functionality within the v4 Client Form Builder screens allows for the creation of specific SEND forms to be published through the Portal to the specific groups relevant to that form (e.g. Parents/Young People and Professionals)

- Restricted question types (such as Person Look-ups) have been blocked from this area in order to protect the data in the MRI Education database when Forms are published.

- Local Authorities can control which SEND Portal and EHCP forms are visible to authenticated portal users for a child or young person

Process Incoming Forms

- B2B processing rules will be used and a suspense area included to support with the processing and matching incoming child data

- A dedicated forms processing area will be accessed in the v4 Client to allow SEND teams to process incoming forms

- ACLs will be set against incoming forms to ensure that, once imported, the forms are protected by the same access control levels as those of manually added forms.
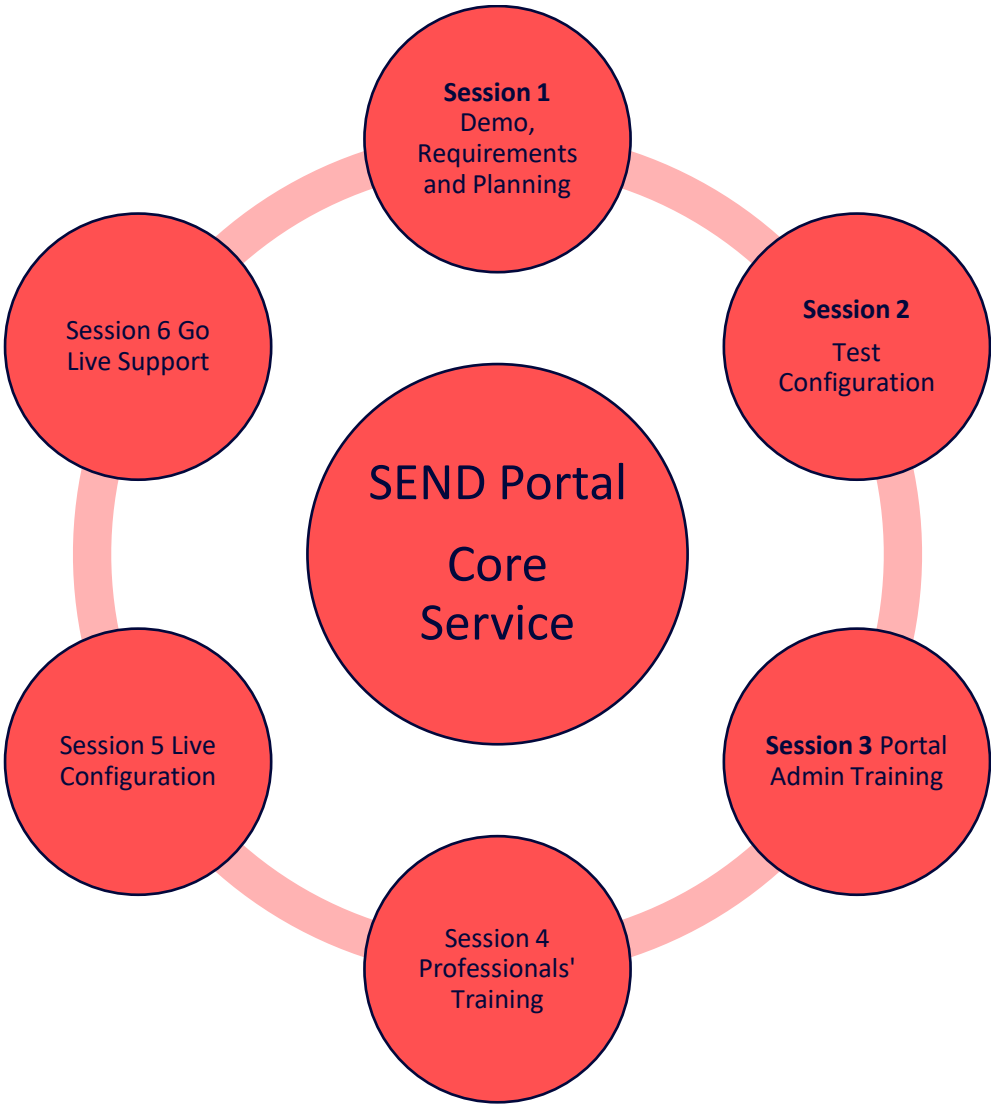
Professionals Accessing the Portal and Portal Information

- All professionals accessing the Portals will self-register; the Portal will enable these professionals to manually add details of a child (which will be matched by LA staff later) and to complete any relevant published Forms

- Local Authorities have the ability to control which portal users (parents, young people and professionals) can view shared SEND information about the subject of an assessment involvement. These users are then considered 'authenticated' for that particular child or young person.

- Information about the timescales and progress of an assessment can be shared on the portals with authenticated parents, young people and professionals

- Portal message notifications can be automatically sent to authenticated portal users based on information that is recorded on a child or young person's involvement form.

- The Local Authority can record what information or advice they have requested about a child or young person on their EHCP assessment involvement. This information can then be used to send portal message notifications as a reminder for this information to be submitted

- Portal users can upload documents and images to their SEND Portal form submissions. The Local Authority can also upload documents and images to EHCP forms and SEND Portal forms that are stored against a child or young person's chronology in the v4 Client

- As this new SEND Portal functionality involves the electronic sharing of information, two step verification has now been introduced on the portals

Service Overview

We will assist in the successful implementation of the SEND Portal by providing the following:-

Session 1
Demo, Requirements and Planning

Session 2
Test Configuration

Session 3 Portal Admin Training

Session 4 Professionals' Training

Session 5 Live Configuration

Session 6 Go Live Support

SEND Portal Core Service

We believe in a strong emphasis on a proactive partnership with the customer. The MRI Education Project Coordinator will work closely with the customer's appointed Project Lead throughout the project to achieve this. The MRI Education Project Coordinator is the coordinating MRI staff member assigned to the project and is therefore able to respond authoritatively to the needs of the project and will actively and continually monitor progress on all risks, issues, actions, and decision in order to ensure successful delivery.

Service Details

Session 1: Demonstrate Functionality, Agree Configuration Requirements and Plan Implementation

Key Prerequisites (full list provided in RAID log)	• Implementation plan will have been discussed and estimated dates agreed with MRI Education Project Coordinator prior to this session
Objectives	• Demonstration of Form Builder functionality and Portal elements • Agree requirements for Portal configuration (as far as possible) • Agree LA roles and responsibilities for administration of the portals and processing incoming data • Discuss Form requirements • Agree implementation plan
Audience	• MRI Education Co-ordinator(s), Data Team representative, ICT representative and MRI Education Lead SEND users (with detailed knowledge of processes and system use).
Standard Agenda	• Demonstration of SEND Portal elements • MRI Education to share an implementation project plan including pre-requisites and a copy of the RAID log • Confirm the implementation dates are suitable to meet the project requirements.
Outcomes	• Key business users have a high-level understanding of how the Portals will be implemented • All stakeholders have a shared understanding of the project scope and timescales • All stakeholders have a shared understanding of the resource requirements from themselves and their teams

	• Portal configuration requirements are broadly agreed (i.e. types of form to be published) • Form requirements for Portal understood (including multiple response questions) • RAID log provided following session to document Risks, Actions, Issues and Decisions impacting on the success of the project

Session 2: Implementation of SEND Portals (Test) & readiness for UAT

Key Prerequisites (full list provided in RAID log)	• Session 1 complete • Team are current users of Form Builder, or have received training as part of this implementation (See Additional Service Options below) • Outstanding configuration requirements documented (to be supplied to the Knowledge Specialist at prior to or at the beginning of the session) • Remote access to v3 Client, v4 Client, v4 Online with a MRI Education System Administration Account with system administration permissions in 'Test' environment (ideally a recent copy of Live) • The version of MRI Education must comply with the current MRI Education support policy (Current release or -1) and processes running and installed on the Test Instance including Technical Install of Web Server components; URLs for Citizen's and Professionals Portals are operational in Test. • V4 SEN Module licensed and in use within the LA • Local Authority to identify the delegates and inform them of the task detail
Objectives	• Configuration of the Citizen and Professionals Portal elements of the SEND Portal in the Local Authority's 'Test' environment with relevant permissions for Test users and Training delegates • Sufficient training provided to allow testing by lead users.
Audience	• MRI Education Co-ordinator(s), IT Support and Lead SEN&D users
Standard Agenda	• Configuration of the generic elements of the Citizen's Portal (may not be required if other Citizen's Portal applications are already in use in the LA) • Configuration of the generic elements of the Professionals Portal

	• Configuration of the SEN&D-Specific Elements of the Portals and any e-mail/messaging content required • Creation of example Parent/Young Person and Professionals Forms (with a limited number of questions based on the time available) • Dry-run completion and import of Forms – to include check of B2B suspense processing and processing incoming forms • Creation of Permissions Groups to allow User Testing and Training
Outcomes	• The Portals will be configured within the 'Test' environment • The SEN&D team representatives will be able to carry out basic user testing on publishing and importing forms, dealing with incoming suspense and Authenticating professionals • The 'Test' environment can be utilised for wider user training • Key Portal setup is captured and documented on the RAID log

Session 3: Portal Admin Training

Key Prerequisites (full list provided in RAID log)	• Session 2 complete • Local Authority to provide access to laptops/pcs for the delegates with access to v4 online, v4 Client and Portals URLs in 'Test' environment • Access to v4 Client, v4 Online and Portal URLs with a MRI Education System Administration Account with system administration permissions in 'Test' environment • Test environment has not been over-written since Session 2
Objectives	• Train administrators on the Portal Administration Functions • Train relevant users on B2B processing for incoming child information • Train SEN&D users in the processing of incoming Forms and associated tasks • Capture and document any configuration changes required • Further refine the business processes
Audience	• MRI Education Co-ordinator(s) and Portal Administrators and SEN&D users responsible for processing incoming forms (maximum 8 delegates, further sessions can be purchased as repeats if required)
Training Topics	• Training for Portal Administrators on the configuration and administration of the Portals • Authenticating Professionals • Dealing with incoming Child information • Training for SEN&D users in importing and accessing and approving Portal Forms once submitted • Understanding where Multiple Response questions are appropriate and how these are used • Confirmation that configuration and permissions are suitable and agreed (sign-off for Live configuration) • Control which portal users (parents, young people and professionals) can view shared SEN&D information about the subject of an assessment involvement. These users are

	then considered 'authenticated' for that child or young person.
	• Control which SEND Portal and EHCP forms are visible to authenticated portal users for a child or young person
	• Show how Information about the timescales and progress of an assessment can be shared on the portals with authenticated parents, young people and professionals
	• Show how Portal message notifications can be automatically sent to authenticated portal users based on information that is recorded on a child or young person's involvement form
	• Show how the Local Authority can record what information or advice they have requested about a child or young person on their EHCP assessment involvement. This information can then be used to send portal message notifications as a reminder for this information to be submitted
	• Show how Portal users can upload documents and images to their SEND Portal form submissions. The Local Authority can also upload documents and images to EHCP forms and SEND Portal forms that are stored against a child or young person's chronology in the v4 Client
	• Show how two step verification works to aid greater security in passing sensitive child data over the internet
Outcomes	• MRI Education Coordinator and/or SEN&D users will have an understanding of how to manage Portal Administration, Portal User Administration and incoming child and Form data
	• Confirmation that configuration and permissions are suitable (any further configuration amendments to be sent to Project Coordinator before Session 4).

Session 4: Professionals Training

Key Prerequisites (full list provided in RAID log)	• Session 3 complete • Local Authority to provide access to laptops/pcs for the delegates with access to v4 online, v4 Client and Portals URLs in 'Test' environment • Access to v4 Client, v4 Online and Portal URLs with a MRI Education System Administration Account with system administration permissions in 'Test' environment • Test environment has not been over-written since Session 3
Objectives	• Train Users from a chosen pilot service (LA to decide) on how to use the SEND Portal functionality • Capture and document any configuration changes required • Further refine the business processes
Audience	• MRI Education Co-ordinator(s) and Portal Administrators and SEN&D users responsible for processing incoming forms and Users from specific Service(s) (maximum 8 delegates, further sessions can be purchased as repeats if required)
Training Topics	• Registration Process • How to Update 'My Account' Details • How to complete appropriate Professional Template Forms • How to add details of children involved with • Understanding the current stage pf progress for a statutory assessment via an appropriate timeline view • How and when to use the Upload document functionality
Outcomes	• Professional Users will have an understanding of how to submit and manage their workload requirements via the Portal, and a greater understanding on how this tool will aid the requirement of the SEN&D Code of Practice to Improving the efficiency and visibility of the SEN&D process in local authorities • Confirmation that configuration and permissions are suitable (any further configuration amendments to be sent to Project Coordinator before Session 5).

Session 5: Live Configuration

Key Prerequisites (full list provided in RAID log)	• Session 4 complete • Required Forms created in 'Live' environment (Services are available to assist with this; see Additional Options) • User Acceptance Testing completed and requirements signed-off • Outstanding configuration requirements documented (to be supplied to the Knowledge Specialist at prior to or at the beginning of the session) • Remote Access to the v3 Client, v4 Client, v4 Online and Live Portal URLs with a MRI Education System Administration Account with system administration permissions in 'Live' environment (& 'Test' if require to check previous settings)
Objectives	• Configuration of the 'Live' Portals and 'Live' Forms published • Permissions groups configured for SEN&D users as required to complete the necessary processes
Audience	• MRI Education Co-ordinator(s), Portal Administrators and SEN&D lead users
Standard Agenda	• Replicate 'Test' configuration in 'Live' environment taking into account any changes to the configuration on the RAID log following the User Acceptance Testing and Training • Publish 'Live' Forms (updates to forms to be carried out by LA unless additional Services have been commissioned) • Apply the relevant permissions to the group for the users to enable them to access the relevant areas in the 'Live' environment
Outcomes	• The Portals and relevant Forms will be available in 'Live' environment • The Local Authority users will be confident about the process required to administer the Portals, process incoming forms and authenticating Professionals

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Session 6: Post Go Live Support

Key Prerequisites (full list provided in RAID log)	• Session 5 completed • Agree agenda for the session based on LA requirements • LA identifies a relevant venue for the session with a possible meeting room and area to project, OR within the SEN Teams office at delegates desks • LA to provide feedback (prior to the session) about any further issues that have arisen during and since UAT • Access to the v3 Client, v4 Client, v4 Online and Live Portal URLs with a MRI Education System Administration Account with system administration permissions in 'Live' environment.
Objectives	• To provide support to the Local Authority teams as they go Live using the Portal
Audience	• MRI Education Co-ordinator(s), Portal Administrators and SEN&D lead users
Standard Agenda	• Agenda to be determined by the LA in advance of the session
Outcomes	• The Portals and relevant Forms will be available in 'Live' environment • LA is 'Live' with the Module

Additional Service Options

Additional Elements (as required)	Sessions required	Resource Required
Introduction to Form Builder and Basic Form Creation Learn how to build your own EHC Plans using the form builder functionality for publishing Forms through the Portal The Knowledge Specialist will work with the SEN&D team to create 2 simple forms, one to be used by Parents/Young People and one to be used by Professionals. These forms should be used as a proof of concept and kept to a fairly small number of questions. If more detailed forms are required additional costs may be incurred	1	MRI Education Support Team
Creating Plan/Form Outputs Training for the SEN&D team/nominated users on how to create outputs of EHC Plans and other Forms using the Quick Report functionality and a workshop session to start creating the required output	1	MRI Education Support Team / Service Users
Customised Forms We will work with you to design your own custom EHC Plan or additional Forms. This session can vary in length depending on the complexity of the Forms required. As part of this session, we will provide you with an estimate for us to build, test and implement your EHC Plans and/or Forms to be published using the SEND Portal.	1*	MRI Education Support Team / Service Users and Managers
Introduction to Timelines Learn how to build your own Workflow Timelines using the v4 Timelines functionality	1	MRI Education Support Team / Service Users and Managers
Custom Timelines Your existing SEN timeline(s) can be re-vamped or amended to bring it in line with any new business processes. Please	Maximum of 4	MRI Education Support Team / Service Users and Managers

Additional Elements (as required)	Sessions required	Resource Required
note that this does not include changes required to create letters or reports.		
Letters and Reports Any amendments to letters and/or reports or new letters and/or reports that need creating will be priced on an individual basis.		
Additional Post-Implementation Floor-walking Review the implementation of the SEND Portal and any additional elements of SEN/EHCP functionality introduced to the team through this project to ensure the implementation is bringing about the maximum benefits.	1	MRI Education Support Team / Service Users
Best Value Review (BVR) A BVR will assist you in understanding the needs of the SEN&D Team and the transition to utilising the SEND Portal and the wider SEN&D module functionality	1	MRI Education / SEN Team