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# CORPORATE AND COMMUNITIES OVERVIEW AND SCRUTINY PANEL
# 13 JULY 2022

# THE COUNCIL'S SOFTWARE FOR ADULT SOCIAL CARE/ CHILDRENS SERVICES (LIQUIDLOGIC)

## Summary

1. The Panel has requested an overview of Liquidlogic, which is the software used by Worcestershire County Council (the Council) for managing and recording Adult and Children's social care data alongside financial management and reporting capability via the Data warehouse.

2. The report includes the background to software provision and the benefits of using Liquidlogic.

3. The Cabinet Member with Responsibility for Corporate Services and Communication and the Strategic Director for Commercial and Change have been invited to the meeting.

## Background

4.      Liquidlogic is a provider of software for local authority social care. Liquidlogic's social care software is built on a modern platform that is flexible, intuitive, and secure.

5.      Liquidlogic was purchased by the Council to replace the legacy Framework-I system from Servelec Corelogic, which would no longer be supported by the supplier after 2019. Development of new functionality in Framework-I ceased around 2013 as the supplier focused on its next generation system. The lack of Framework-I development prevented the Council from using the case management system to modernise and support service development and improvement to include the Alternative Delivery Model[1], 3 Conversations[2] and information sharing with Health. The Council was looking for a supplier that was able to support its vision for Children's social care, enhance its strength-based approach in Adult social care, improve financial transactions and analysis, and enable the digital transformation programme.

6.      Since the implementation of Liquidlogic in Adults (LAS) in November 2019 and Childrens (LCS) in March 2020, the systems have supported the People Directorate and Worcestershire Children First (WCF) to deliver the Council's ambition and determination to deliver an excellent service to Worcestershire's families. Liquidlogic has equipped practitioners with appropriate technology; and will also enable in time Worcestershire's

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[1] Alternative Delivery Model for Worcestershire County Council's Children's Services led to the creation of Worcestershire Children First
[2] The 3 Conversations (3Cs) is a strengths-based approach to providing services that work collaboratively with people seeking support, including carers.

social care services to be more mobile and dynamic in their engagement with Adults, children, their families and information sharing with key partner organisations.

**Overview of the Liquidlogic Implementation Project**

7.   Following a competitive tender process, Liquidlogic was awarded the contract based on a 50/50 split between quality and price. The Council was particularly drawn to Liquidlogic's user interface and unique graphical functionality such as Atom, which allows users to see a person's existing personal and professional relationships.

8.   The contract between the Council and Liquidlogic was signed on 28 September 2018. The programme initially focused on the move to the new case management system with some service operational improvements. The subsequent phase brought about alignment with the Council's Digital Strategy, improved information sharing with the Council's key business partners, and implementation of additional modules.

| | Children's | Adults | Finance (ContrOCC) |
|---|---|---|---|
| **Core Functionality** | Liquidlogic Children's System (LCS)<br>CSE Workspace<br>Legal Workspace<br>CP-IS Early Help Module<br>Children's Data Warehouse | Liquidlogic Adults System (LAS)<br>Adults Data Warehouse | Adults Contracts and Payments<br>Adults Charging License<br>Children's Full Contracts and Payments License<br>Data Warehouse |
| **Additional Functionality** | Signs of Safety Forms<br>Children's Mobile Application<br>Children's Portal<br>GroupWork (For Children's Centre Management)<br>Delegation Portal<br>Children's Number Loader<br>Gazetteer integration<br>SAML integration<br>G-5 Data Extracts to CAP (Out Systems) | Adults Mobile Application<br>PDS[3] Integration (with the NHS Spine[4])<br>Adults Portal Integration with WCC<br>Adults Portal G-6 Exporter – Hourly Extracts G-16<br>Adults Number Loader<br>EMIS integration with LAS<br>Delegation Portal for Adults | Adults Provider Portal<br>Children's Provider Portal<br>Generic Web Services API's (for interfacing with the corporate financial system)<br>On-line Financial Assessments (OFA)<br>Billing Module – Debt Management<br>Landscape – Prediction tool for social care provision using current and future trends |

9.   Implementation of the Social Care Case Management System was achieved within 12 months for Adults (LAS) and 15 months for Childrens (LCS), as well as their complimentary social care finance systems, ContrOCC. Of particular note is that

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[3] The Personal Demographics Service (PDS) is the national electronic database of NHS patient details such as name, address, date of birth and NHS Number, which includes demographic information.

[4] The NHS central 'Spine' is the digital central point allowing key NHS online services and allowing the exchange of information across local and national NHS systems.

Childrens went live during March 2020, at the start of the pandemic, and it is to the credit of all staff involved that they were able to achieve this.

10. In line with Council ICT policy of cloud first, the solution was externally hosted by Liquidlogic, allowing for improved performance, security and business continuity.

11. Migration to Liquidlogic required improved data quality due to the methodical nature of the system, ensuring that each step is completed before moving on to the next. The migration also provided an opportunity for data cleansing, so the data loaded was more accurate.

## Liquidlogic Adults' Social Care System Software (LAS

12. The Liquidlogic Adults' Social Care System (LAS) is designed to be used by social workers, professionals in partner agencies such as health, care providers, the third sector, service users, and carers.

13. LAS provides flexible and comprehensive functionality to enable the management of the core care pathway, provider management, financial management.

## Liquidlogic Children's Social Care System Software (LCS) and Early Help (EHM)

14. Worcestershire Children's First has worked with Liquidlogic to ensure the functionality supports day to day Children's social care practise and work with partner agencies to support children, young people and their families to deliver our service. This was recognised by Ofsted in the July 2021 iLACS[5] visit.

15. The Early Help module is used by our family support teams in the delivery of Early Help, our Vulnerable Learners Team in education, and current plans are to use EHM instead of Capita for Special Education Needs and Disabilities (SEND).

## Social Care Finance Software (ContrOCC)

16. Finance is an integral component of social care case management. Liquidlogic works in collaboration with Oxford Computer Consultants (OCC), a provider of financial software in social care, to provide integrated finance modules (ContrOCC).

17. The ContrOCC social care finance module (for Adults and Children) is designed to meet the specialist needs of finance professionals in social care. For finance officers: configurable finance functionality is designed around their requirements. Social workers and managers continue to plan and provision services using their familiar case management system. The financial impact of every decision is known before a commitment is made.

## Client and Provider Portals

18. Partner Portals for professionals making referrals to Children's social care, early help, and LADO[6] have been implemented. These enable partner agencies and professionals to engage securely with system data via a portal so they can contribute to workflow and processes.

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[5] Ofsted's framework and guidance for inspecting local authority services for children (ILACS)
[6] Local Authority Designated Officer

19. **Children's Client Portal:** Currently WCF are developing the transfer of Education, Health and Care Plans (EHCP) out of Capita into Liquidlogic, which will include the use of the portals in the development of EHCP plans for children and young people with both partner agencies and families.

20. **Adult Self Service Client Portal:** The portal enables Adults and carers to access information and provide signposting to the support they need. The portal is configured to enable Adults to determine whether they are likely to qualify for local authority support, both in terms of needs and financial eligibility. Adults can contact the Council online and inform them of their care requirements. The portal is fully integrated with the back office social care system and, as a result, a history of portal interactions is held against a client's record, eliminating the need for the practitioner to manually transfer information from a portal to the case management system and saving time.

21. **Childrens Social Care Provider Portal:** WCF use the portals for professionals to make safeguarding referrals to Childrens social care, request for early help family support, make position of trust referrals to the LADO, fostering enquiries and requests for information. A visual image of the Children's portals is included in Appendix 2.

22. **Adult Social Care Provider Portal:** This facilitates online interaction with suppliers, enabling them to receive purchase orders online and submit actuals back which leads to automatic electronic payments. The information displayed is a mirrored view of what is held in the main ContrOCC finance system. A visual image of the Adult's portals is included in Appendix 3.

23. **MASH Portal**: For Childrens Services the secure MASH[7] portal is accessed by the Harm Assessment Unit, police, youth justice, probation, education, drug and alcohol services, Adults safeguarding, and health. Police also have a separate portal within Liquidlogic which allows them to send police referrals to both Childrens social care and early help family support supporting their volume and demand and ensuring that the right information goes to the right place for decision making.

24. As a user, be that a professional or a member of the public, the portals are accessed via the Council website and only one login is required to access the desired portal functionality. External partners include the police, schools, colleges, Health, GPs, hospitals, ambulance services, court officers, probation, housing, drug and alcohol services and partners who are external to Worcestershire who may need to refer into children or Adults services.

## Data Protection Compliance (UK GDPR)

25. A full Data Protection Impact Assessment (DPIA) was completed to support Liquidlogic project and ensure data protection, and compliance with the data protection principles, was woven into the deployment of the software.

26. The data quality work required to enable the successful migration of data into Liquidlogic improved the accuracy of the data held and identified the information that needed to be transferred over to the new system (and therefore the information that is no longer needed so could be deleted).

27. The ability to apply retention periods and calculate the date a service user's records should be destroyed so records are deleted in a timely manner and in line with the

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[7] MASH – Multi Agency Safeguarding Hub

Council's retention policies.  This functionality is supported by workflow processes to validate the calculated retention dates, so records aren't deleted before they need to be (for example to enable compliance with the request from the Independent Inquiry into Child Sexual Abuse to pause deletion of certain types of records until their inquiry ends).

28.  The separate LCS, EHM and LAS modules assists the deployment of the 'need to know' principle as access permissions to Children's and Adult's social care data can be managed separately.

29.  The client and professional portals offer secure mechanisms for the receipt of information and referrals and reduces any potential risk of information being sent to the wrong recipient or not being actioned by relying on email or postal processes.

30.  Liquidlogic has supported better mechanisms for appropriate information sharing between organisations, including direct access for approved third-parties for specific purposes (e.g. to deliver Mental Health services) and the Integrated Care Record.
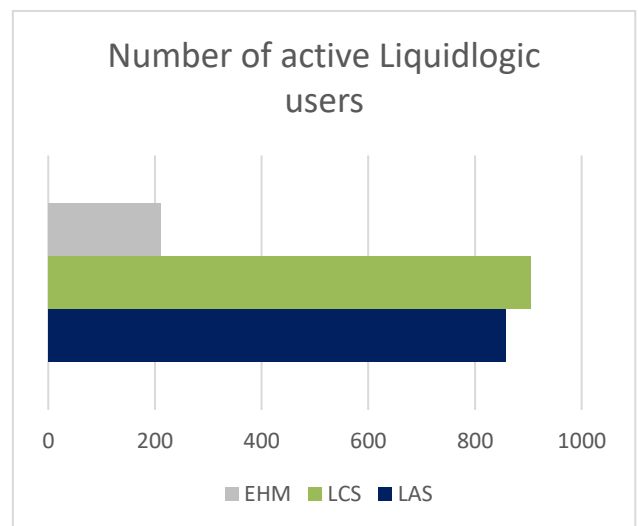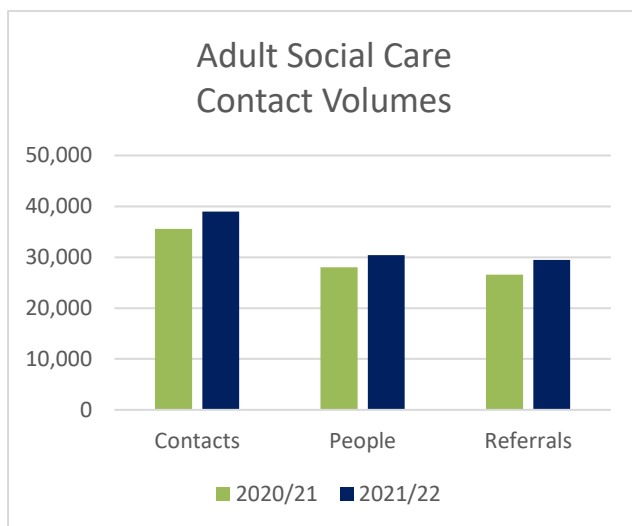
**Data and Statistics**

31.  The LADO portal was launched in March 2021, then went officially live from 1 April 2021 onwards. Between 1 April 2021 to 31 March 2022, 413 referrals were received through the LADO Portal.
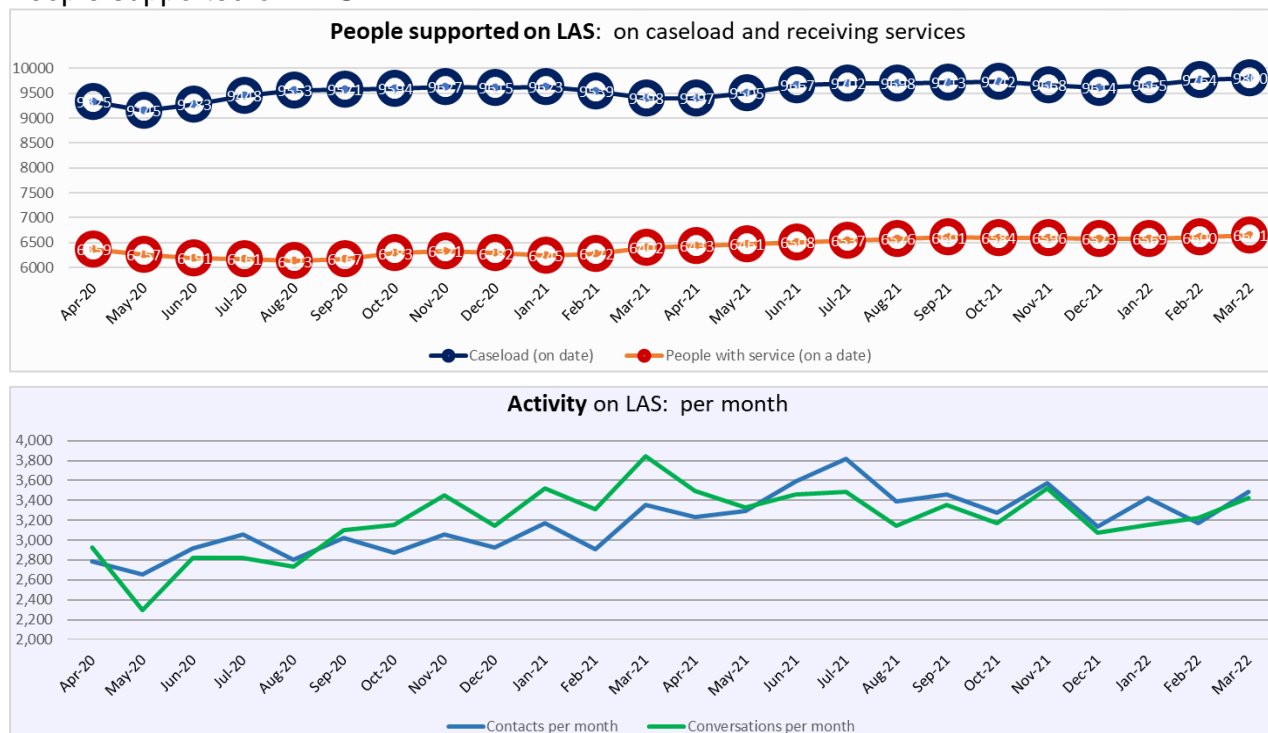
32.  For referrals to Children's social care, 14,221 contacts were received from 1 April 2021 to 31 March 2022, which equates to an average of 1,185 per month.

33.  WCF Early Help Family Support Team received 11,239 requests for services, averaging 1,022 per month.

34.  The data below shows the trend for area teams since 1 Dec 2019, shortly after the implementation of LAS.

People supported on LAS

**People supported on LAS**: on caseload and receiving services

Legend: —— Caseload (on date)  —— People with service (on a date)

**Activity** on LAS: per month

Legend: —— Contacts per month  —— Conversations per month

## Governance and the SCCM[8] Steering Board

35. Following implementation of Liquidlogic for Finance, Adult and Children Services, a further phase of case management system development was agreed to:
   i. Implement additional (see section 8 for details) system functionality within the Adult and Children Services case management and finance systems aligned to the Council's strategic transformation agenda.
   ii. Implement contract management to review and monitor system performance and any associated system downtime, including operational impact.
   iii. Ensure systems are fully interoperable and aligned with UK Government standards, and with all other Council business systems that touch social care commissioning, practice, and service delivery.
   iv. Ensure the data held in the social care case management systems meets quality standards that fulfil the Council's obligations to its residents under all information governance regulations and legislation.
   v. Ensure the programme is aligned with other major projects where there are inter-dependencies or impacts (directly or in-directly).

36. The programme is led by the SCCM Steering Board, which now meets quarterly to set direction, secure resources, manage overall risks and ensure objectives are achieved. Delivery is executed through the governance structure below.

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[8] Social Care Case Management

## Senior Leadership Team

| SCCM Steering Board | Audit Quality Assurance |

| Worcestershire Children First Prioritisation Board | People Directorate Change Board | IT and Digital Liquidlogic Support Team |

**Benefits Achieved**

37. The Liquidlogic project delivered a sustainable, resilient, and secure web-based Case Management System that can adapt to changing government legislation and guidance for example, DoLS[9] and the Social Care Charging Reform[10].

38. Liquidlogic now supports staff in maintaining accurate, timely and comprehensive case records, facilitate robust management oversight and improve performance management and quality assurance.

39. The following benefits have been achieved:

| Category | Benefit |
|---|---|
| **Productivity and Efficiency** | Managers can maximise the use of available resources through more accurately matching care needs and provision and support reviews, both scheduled and unscheduled, to ensure needs are met |
| | Client-related data is captured electronically at source and is entered only once |
| | The ability to make decisions on referrals in 24 hours in Children Services |
| | A costed care plan enables accurate forecast of future care spend commitment |
| | Information can be extracted directly from the case management system to support multi-agency needs-based planning e.g., Integrated Care Record |
| | A structured workflow and standardised processes is under pinned by policies and regulations that ensure improved compliance |

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[9] The Deprivation of Liberty Safeguards (DoLS) procedure is designed to protect a person's rights if the care or treatment they receive in a hospital or care home means they are, or may become, deprived of their liberty, and they lack mental capacity to consent to those arrangements.

[10] The Social Care Charging Reform (Care Cap) will introduce a lifetime limit on how much individuals will have to pay towards their care costs.

| | |
|---|---|
| | Workload management is a core aspect of the system enabling workers and managers to identify priority work and re-assign case tasks where necessary |
| | Professionals have one user account and can send information to both Adults and Children's Services |
| | for children's the improvement in the ability to make decisions on referrals in 24 hours  FWI comparison to LL data  as the system has done this and Enabled the Council to manage a greater demand during Covid at the same time through reduced duplication and ease of data entry |
| | If a professional sends information to the wrong place in error, it can be added it to the system and shared with the correct team |
| **Security** | Security profiling enables multiple agencies to use the system appropriately |
| | Implementation of Single Sign-on to improve both security and user experience |
| | User profiling enables more granularity and auditing of access to the system to meet user needs. |
| **Data Protection** | Better mechanisms for appropriate information sharing between organisations, including direct access for approved third-parties for specific purposes |
| | Implementation of a retention policy and deletion of records |
| | workflow processes to validate the calculated retention dates, so records aren't deleted before they need to be |
| | The security model enforces data protection requirements |
| **KPIs and Reporting** | Senior managers can directly view the performance of the services and of individual teams against key indicators and planned progress |
| | ContrOCC enabled accurate payment and recording of Covid grants, often at short notice |
| | Management Information and Analysis teams have been able to use ContrOCC data to establish clear financial reports that have streamlined Budget Monitoring around Social Care Placements |
| | Service transformation through the use of 'best practice' processes |
| | Improved supplier relationships have been achieved from quicker cash flow processing |
| | Compliance with statutory requirements around practice and legislation |

| | |
|---|---|
| | The self-service provider portal improves communication and service for those in need, whilst at the same time helping the Council reduce costs and save time |
| | Managers can use financial reports and care trend analysis to contain care costs within agreed budgets |
| | Managers have easy access to high quality information and reports |
| | Timeliness of accurate and reliable information that supports commissioning and management decision |
| | Enabled further development of manager self-service reporting and deployment of dashboards to enable improved understanding of performance across services |
| | Introduction of key 'mandatory fields' to improve data quality. Mandatory fields have been designed to provide a careful balance between recording essential information and not creating a recording burden for staff or preventing urgent work from progressing |
| | Improved data quality and accuracy of data |
| **Ease of access** | Provider portals enable partner agencies and professionals to engage securely with system data via a portal so they can contribute to workflow and processes. |
| | Improved access for clients to access information via the portals |
| | The Children's Client Portal provides access to EHCP plans for children and young people for both partner agencies and families. |
| | The Adult Self Service Client Portal enables Adults and carers to access information and provide signposting to the support they need. |
| | Improved accessibility for practitioners in the field using their tablet devices and web based Liquidlogic system |

## Liquidlogic Roadmap

40.  The SCCM Steering Board oversees the ongoing development of the system. The programme of work includes:

      i.    Integrated Care Record[11]: Liquidlogic will enabling a user to view health data within the system and enable health partners to view social care data in their health system(s) and apply consent and permission rules where appropriate.

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[11] An Integrated Care Record (ICR) is a way of bringing together the various electronic records of a person's care. It takes information directly from existing systems used by health and social care organisations and presents it in a structured, easy-to-read format for health and care professionals.

ii. Social Care Charging Reform Programme: The need to be able to receive and process requests for all residents, including self-funders, for care needs and financial assessments and development of Care Accounts will be further supported through development of Liquidlogic and Controcc linked to the Social Care Charging Reform Programme.

iii. Adult Social Care Client portal: The ambition of the corporate Customer Experience Programme is to transform the way in which customers access services and information, and improve the end-to-end customer journey, including enabling as much service delivery through self-service. The first phase of the Customer Experience Programme is focused on Adult Social Care, which initially will see the Adult Social Care Client portal become live. This will enable efficiency for professionals and the Adult Social Care (Hear2Help) front door and social workers – where emails and telephone calls will be reduced / eradicated and professional referrals will come through online via the portal.

iv. Special Education Needs and disabilities: SEND is being migrated from Capita to the Early Help Module. The Education, Health and Care Plan will have a new portal developed.

v. Social Care Charging Reform (Care Cap): The statutory requirement to deliver CareCap in Adult Social Care will be implemented.

vi. Deprivation of Liberty Safeguards (DoLS): Legislation changes to Liberty Protection Safeguards (LPS) for Adults and Childrens' services will be implemented.

vii. Client Finance Portal: the portal will be live in 2022 to support the CareCap delivery.

41. For an overview of future developments please see Appendix 1: Liquidlogic and ContrOCC Roadmap

## Purpose

42. The Corporate and Communities Overview and Scrutiny Panel is asked to:

- consider the information provided in the report
- determine any comments to highlight to the Cabinet Member with Responsibility for Corporate Services and Communication.

## Supporting Information

- Appendix 1: Liquidlogic and ContrOCC Roadmap
- Appendix 2: Liquidlogic Children's portal
- Appendix 3: Liquidlogic Adults portal
- Appendix 4: Glossary

## Contact Points

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**Background Papers**

In the opinion of the proper officer (in this case the Assistant Director for Legal and Governance) there are no background papers relating to the subject matter of this report.

## Appendix 1: Liquidlogic and ContrOCC Roadmap
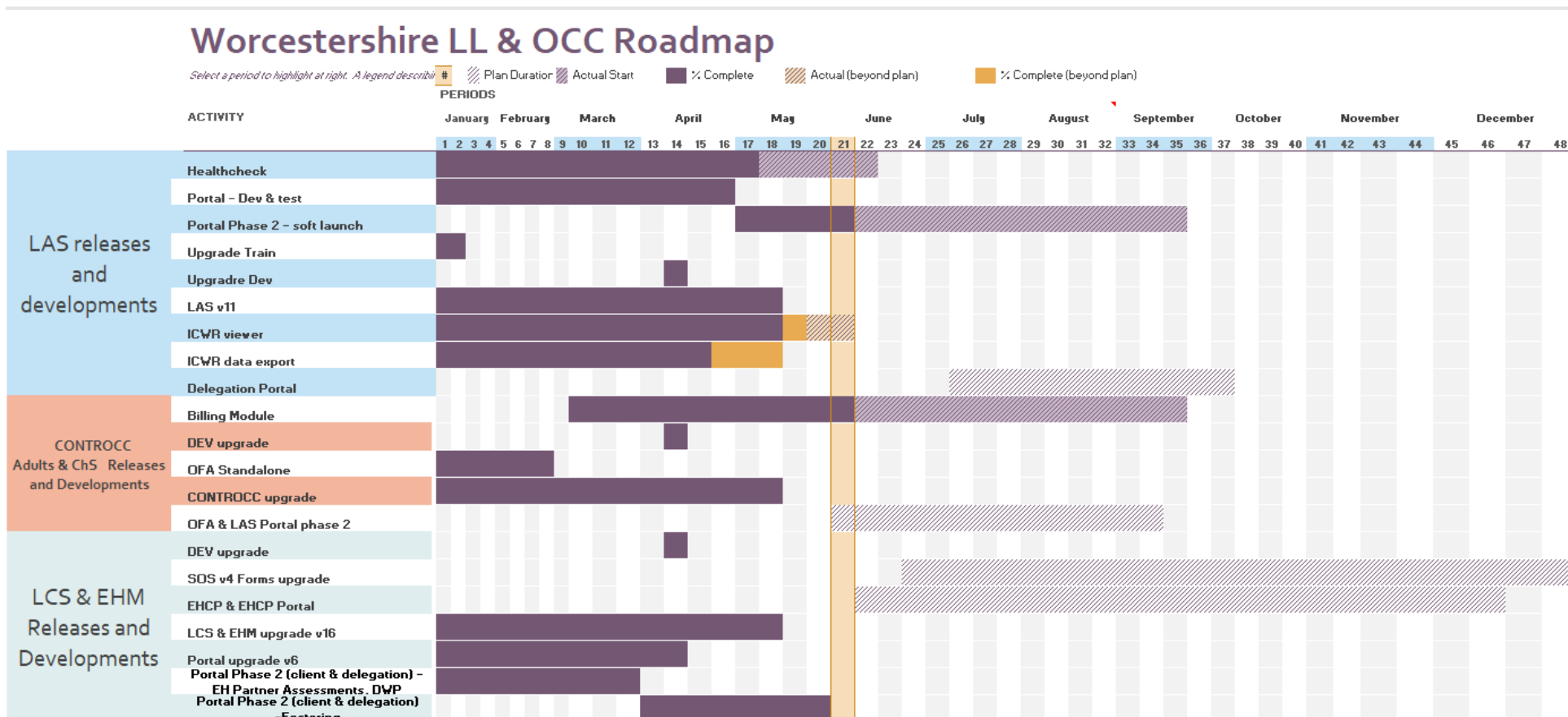
**Appendix 2: Liquidlogic Children's Portal**

## Accessing the Portal

### Children, young people and families

Our aim is to work with parents, carers and young people together and to offer advice and support before a situation reaches crisis point. We also work in partnership with, and may refer you to, other services and community groups, including education, health, housing, benefits agencies and the police that can help support you.



| Schools | Early help family support | Contact us | Fostering and kinship |
|---|---|---|---|
| Are you worried about an adult who works with children? | Request services from early help family support | Get Safe | Education health care plans |
| The Family Hub | Refer to Children's Social Care | Care leavers | SEND Local Offer |

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**Appendix 3: Liquidlogic Adults Portal**



The above is the landing page for the Adults Portal which is currently under development with a soft launch planned for early June.

By clicking **I am a member of the public** tile the user is taken to the screen below where they can select and launch either an online referral form or access links to refer to Children's social care/online financial assessment.

Any form/referral created on the portal integrates directly into the LAS system.



If the **I am a Professional tile** is clicked the below options become available and as with the member of the public forms/referrals there is full integration into LAS.

The individual links to each of the tiles will be available to click through from on the existing Adult Social Care and Safeguarding webpages on the WCC website where users will be able to view other options available to them before directed to the portal.

**Appendix 4: Glossary**

| Term | Description |
|---|---|
| **3 Conversations (3Cs)** | 3 Conversations (3Cs) is a strengths-based approach to providing services that work collaboratively with people seeking support, including carers |
| **CAP** | |
| **CareCap** | |
| **CP-IS** | Child Protection Information Sharing |
| **ContrOCC** | |
| **CSE** | Child Sexual Exploitation |
| **DoLS** | Deprivation of Liberty Safeguards |
| **EHCP** | Education, Health and Care Plan |
| **EHM** | Early Help Module |
| **iLACS** | Ofsted's framework and guidance for inspecting local authority services for children (ILACS) |
| **ICR** | Integrated Care Record. Joined up, coordinated health and social care that is planned and organised around the needs and preferences of the individual, their carer, and family. Sometimes referred to as the ICWR (Integrated Care and Wellbeing Record) |
| **Integrated Children's System (ICS)** | ICS provides a conceptual framework, a method of practice and a business process to support practitioners and managers in undertaking the key tasks of assessment, planning, intervention and review. |
| **LADO** | Local Authority Designated Officer |
| **LAS** | Liquidlogic Adult Services |
| **LCS** | Liquidlogic Childrens Services |
| **LPS** | Liberty Protection Safeguards |
| **MASH** | Multi Agency Safeguarding Hub |
| **NHS Spine** | The NHS central 'Spine' is the digital central point allowing key NHS online services and allowing the exchange of information across local and national NHS systems. |
| | |
| **OCC** | Oxford Computer Consultants (OCC), a provider of financial software in social care |
| **OFA** | On-line Financial Assessment |
| **PDS** | The Personal Demographics Service (PDS) is the national electronic database of NHS patient details such as name, address, date of birth and NHS Number, which includes demographic information. |
| **SCCM** | Social Care Case Management |
| **SEND** | Special Education Needs and Disabilities |
| **Social Care Cap** | The cap is a lifetime limit of £86,000 on how much individuals will have to pay towards their care costs. |
| **WCC** | Worcestershire County Council |
| **WCF** | Worcestershire Children First |