Forward Review Dates

A bit about status expiry, currency and follow ups.

As we know, it is very important that the information that we record about our clients reflects as accurately as possible their current activity. For this reason we have the concept of the 'currency' of the client's status. This currency gives us an indication of how recently someone checked that the status information was correct for that client.

These checks are done in accordance with the DFE guidance on the minimum frequency a client of a particular status should be followed up. If the client is not followed up and the status is not changed or verified, it 'expires' after a certain period of time. These 'expired' clients count towards our Not Known targets and it means our information about this client is not up to date.

You can think about status expiry dates in a similar way to a sell by date on food. We use the sell by date on food as an indicator of whether the food is fresh and safe to eat. In the same way, we use the expiry date of a status to tell us how safe and reliable the data is about that client. Food that goes beyond its sell by date is no longer fresh and safe to eat: statuses that go beyond their expiry date are no longer 'fresh' reliable information about that client….

For those clients in reasonably stable statuses - for example, in school, education or full time employment – that minimum follow up period is a year. This means that, as a minimum, someone should check up with this client at least every year, as to what their status is. It also means that the status will expire after a year if not changed or verified.

If the client is in one of the less stable statuses - for example NEET or temporary employment – that minimum follow up period is three months. This means that their status will expire after 3 months if not changed or verified.

Why we need Forward Review Dates

For some clients on the shortest follow up period, individual circumstances may suggest that this three month follow up period is not always appropriate or sensible.

For example, for a client who is in a custodial sentence which we know lasts for a year, it would make sense for that status to expire at the time coinciding with the end of the sentence, rather than every 3 months as set down by the currency rules. There would be no change to their status during the time they are in custody. By setting the expiry date to coincide with the end of their sentence, you can check whether they are due for release and whether they are now ready for help.

In these instances, we can use a Forward Review Date to agree a date in the future that we will contact the client and at the same time, this will set an expiry date for the status that is different to that of the normal expiry rules.

How Does the Forward Review Date extend the status expiry?

Forward Review Dates are logged as a History record. When you record a Forward Review Date History for a client, you record a Start date which will occur in the future. (This is the date that you have agreed to contact the client). The system then calculates the expiry date for 4 weeks after the Start date of your scheduled review. This means that you then have 4 weeks to follow up with your client and either change or verify their status.

If you don't complete the follow up within 4 weeks of the Start date of your Forward Review Date History, the status will expire.

Which statuses does the Forward Review apply to?

The Forward Review Date can only be used with certain statuses, and even then, you will only use it when individual circumstances suggest that this is appropriate for this particular client. It should be used on a case by case basis dependant on the needs and situation of the client.

The statuses which you can use the Forward Review Date with are:

Temporary Employment

Part Time Employment

Part Time Education

Gap Year students

Custody (Post 16)

Asylum Seekers / Refugees

And those in the following NEET categories:

PDO in receipt in receipt of allowance

Other PDO's

Young Carers

Teenage Parent

Illness

Pregnancy

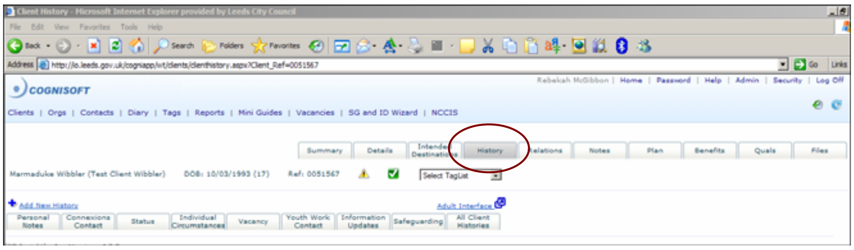
Not economically active

Other reason

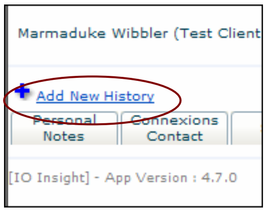
The **Forward Review Date** should be agreed with the client following discussion about their current circumstances (not just decided by the you as the PA!). It should be made clear to the client that you will contact them again on the date that you agree for the **Forward Review**.

Recording the Forward Review Date on Insight

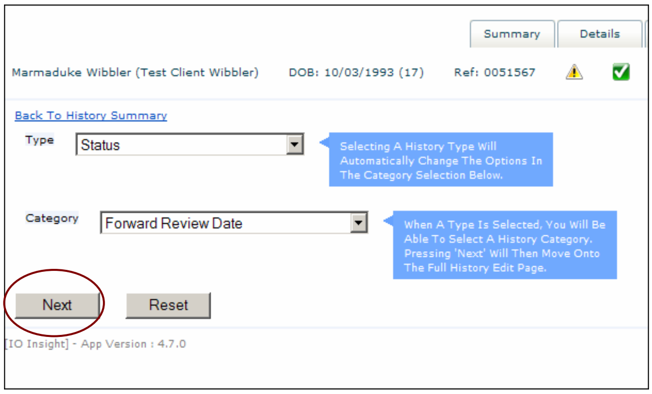
Open up the client record for which you want to record the Forward Review Date. Click on the History tab heading to open the History page (as shown below).



When you have the History page open, click on the Add New History link



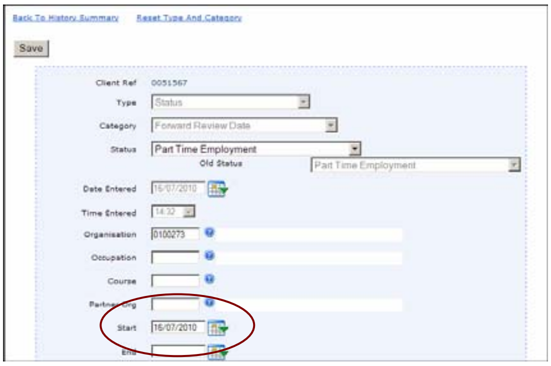
When the page opens, you need to record a Type of Status and a Category of Forward Review Date as shown below.



Then click on the Next button.

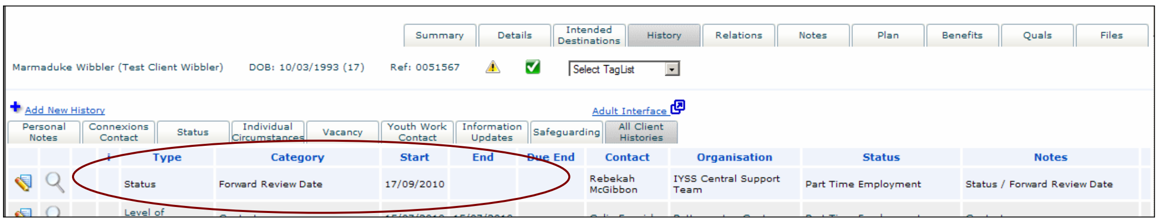
The History page will open up as normal.

In the Start date field you need to enter the date in the future that you agreed to meet and follow up with your client.



Complete the other fields as per normal and in the Notes section include some detail about why you have undertaken the Forward Review and chosen the date specified. When you have finished, click Save.

Then click on the Back to History Summary link, This will take you back to the History Summary Screen where you can see the record you just added.



If you now look at the Details page at the Status Header at the top of the page, you will see that the expiry date has been set to 4 weeks after the date of the Forward Review History.