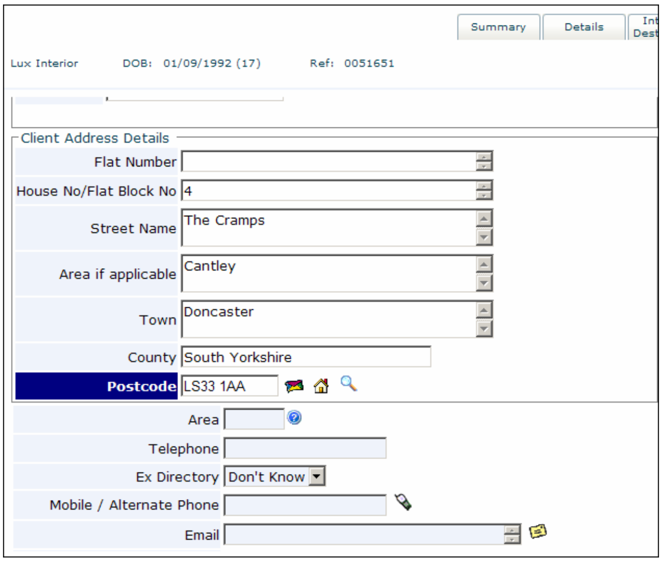
IO Insight User Checklist

This list is aimed at helping you to make the most of all the different areas on the IO Insight system where you can record information about a client. It can be easy to miss out important information on a client if you're not sure where to put it or how to record it.

The Client Details Page – Mandatory Client Information

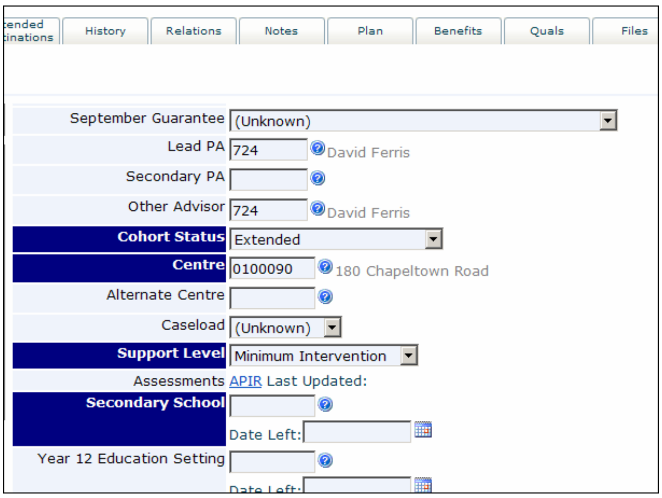
On the client Details page in the left hand column, check the client's mandatory personal details are correct



- Name
- Gender
- Date of Birth
- Address & postcode
- Contact phone number(s). If you need to add more than 2 numbers use the Relations tab (e.g. for a parent/ grandparent/ carer/ sibling/ partner etc)
- Ethnicity
- Religion (can choose Not Disclosed)
- Special Educational Needs category & if they have SEN, what category prompted the Statement or School Action.

In the right hand column

- September Guarantee (this will only appear if the client falls into this cohort i.e. 16 & 17 year olds)



- Cohort status: Primary, Secondary, Extended, No Longer Active Record.
- Centre & Lead PA – the main agency & PA supporting that young person
- Support level: Minimum Intervention, Supported, Intensive
- Secondary School. Also Years 12, 13, 14 & 15

Education Settings

- Achievements (Bottom of Screen): Qualification Level this is the highest qualification the young person has <u>at the moment</u>. Anticipated NVQ Level can be used to show what qualification the client is working towards but not yet achieved.

There are Mini Guides available for further information about….

Insight Mandatory Fields

Recording the September Guarantee

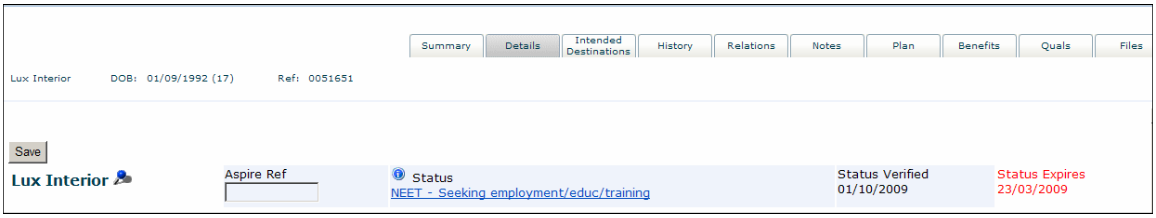
Cohort Status & Flowchart to Determine Cohort Status

Recording Levels of Support

Recording the NVQ Level Equivalency

Client Status – Mandatory Field

It is important that a client's status is up to date. This will appear at the top of the client Details page and will appear in **red if it has expired**.



When you contact a client and establish what their status is you should:
Verify or Change the Status via a 'status history record'.

You cannot change the status on the client Details page, it has to be done on the History page.

It is important you record this first: do this before adding any notes or completing other areas on the record.

If you are changing the status, the Start date is when the client started doing that new status and <u>**not**</u> when you found out.

E.g. the Start date of a college course <u>**not**</u> the date that they told you about it.

Only add a Due End date to the status when there is definite end date

E.g. the end date of a course. Otherwise leave due end date blank.

If you speak to a client/ parent/ carer/ professional and they confirm that the client is still doing what they were, but there is no definite end date to this activity e.g. still in employment or still NEET, remember to Verify the status.

There is a flow chart at the end of this document if you are still confused..

There are also Mini Guides for further information about…
Status Definitions,
Recording a Status Change,
Recording Due End Dates

Intended Destination – Mandatory Field

This is a mandatory field for the DCSF.
Find the Intended Destinations tab from the top of the client record. Every client from year 11 upwards needs an intended destination recorded.

- To add an Intended Destination, pick one from a number of fields: Gap Year, HE, College, Same School, Other School, Training/ Apprenticeship definite place, without definite place, Labour Market with definite place, without definite place, Other, Undecided.
- You can add more than one Intended Destination and select which one is 1st 2nd 3rd choice etc, when you were notified of this and what year group the client is **currently** in. You need to record all these fields for it to recognise that there is a destination recorded.

There is also a Mini Guide with information about…
Recording the Intended Destination

Good Practice & Record Keeping Tips When First Going in to a Record

1) Check the client's status and either Change if it has changed or Verify if it is still the same by recording a Status history

2) Are the contact details correct?

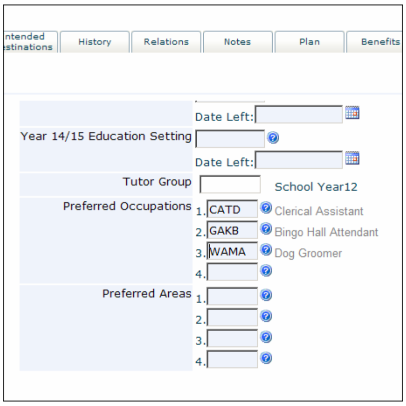
3) Are the individual circumstances up to date? Do any need closing off?

4) Record a Contact history to show the type of contact made, who with and the conversation that took place

5) Update the Guarantee Status if applicable

6) Check the Intended Destination is recorded for clients in yr 11 and above.

7) Check the Preferred Occupation is up to date on client Details page and reflects the client's career goals or the Current / Last Occupation for those who are currently employed.



8) Check and update the client's qualifications and record individual qualifications on the Quals tab. A summary of this information is recorded on Achievements section on the client Details page.

9) The Notes tab stores a range of info: including personal notes, special alerts, health & additional support, SEN notes, benefits notes. This **isn't** where you put your casework notes. They go on a History record.

10) Copies of correspondence with client e.g. letters, action plans etc can be uploaded onto the Files tab.

11) Ensure your contact details are up to date in the Contacts section so other workers can get in touch should they need to.

And remember…

The information that you record needs to be factual, accurate, non-judgemental and up to date.

Ask yourself "If the client requested a copy of their notes from IO Insight, would I be happy for them to read what I have written?".
Avoid using condemnatory and subjective language e.g. stroppy and lazy. Try to express things in terms of observed behaviour.

If you are told a piece of sensitive data from a third party, ask yourself if you really need to record this either for health and safety reasons or for offering the client the best possible service. If you do decide to record this, make sure you make it clear that you are quoting a third party. This way you can record that you have received information without endorsing the factual accuracy of the information you were given.

Sensitive notes need to be recorded in a History record and marked as sensitive – any detail in the Notes section can be read by any system user…

Client Interview Flow Charts

The following flow chart is intended to assist you in entering the correct history records in the correct order on Insight following an interaction with a client or with someone else about the client. Following your interaction, log on to Insight and follow the steps below.

What does the client status say on Insight?
Is it the correct status?

Yes, the status is correct

You now need to VERIFY the status

Add a new history of TYPE: Status and CATEGORY: Verify Status
The Start date is the date you got confirmation of the status

Now you need to add the contact history

Was the interview with the client or with someone else?

The interaction was with the client

Add a new history of TYPE: Contact with Client and the relevant CATEGORY for interview, phone call, e-mail etc

No, the status is **NOT** correct

See over the page

The interaction was with someone else about the client

Add a new history of TYPE: Contact Without Client and the relevant CATEGORY for phone call, e-mail etc

If the status is not correct, you now need to CHANGE the status

Add a new history of TYPE: Status and CATEGORY: Status change.
Its REALLY important to put the date that the client <u>actually</u> started this status in the Start Date field

Because this status might have started in the past and already expired, you now need to VERIFY the status

Add a new history of TYPE: Status and CATEGORY: Verify Status
The Start date is the date you got confirmation of the status

Now you need to add the contact history

Was the interview with the client or with someone else?

The interaction was with the client

Add a new history of TYPE: Contact with Client and the relevant CATEGORY for interview, phone call, e-mail etc

The interaction was someone else about the client

Add a new history of TYPE: Contact Without Client and the relevant CATEGORY for phone call, e-mail etc

Insight Client Record Tick List

☐ Check Status: Change or Verify Status
☐ Check Client Contact Details
☐ Record Guarantee Status (if applicable)
☐ Individual Circumstances (if applicable)
☐ Record Contact history & conversation info
☐ Complete Outcome history (if applicable)
☐ Check qualification details up to date
☐ Check Intended Destinations up to date
☐ Check Preferred Occupation and Current / Last Occupation up to date
☐ Notes tab to record certain info about client
☐ Correspondence docs uploaded to Files tab