

Status and Status Changes

Recording Status Changes in Insight.

What is Status and why is it important?

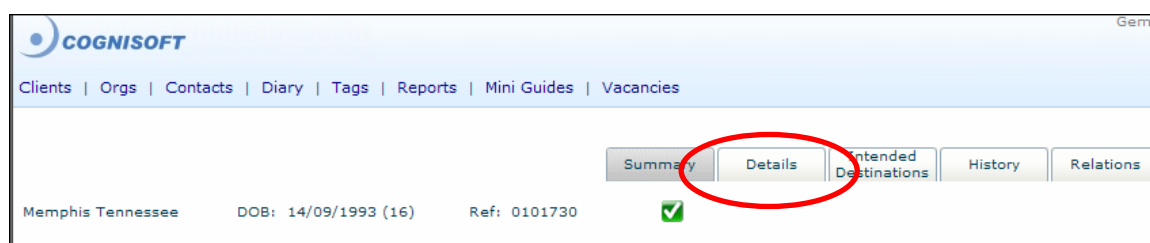
Status is what the young person is doing **right now**. It is really important that we record accurate **Status** information for the young people that we work with for a number of reasons. Firstly, it is because we use this information to support Service targets. Targets are an important part of performance management because if we cannot measure how we are doing in relation to supporting young people, we will be unable to improve our services and ensure we are meeting young people's needs. Secondly, if we accurately record the **Status** of a young person it will help us in identifying those that most need our support, as well as giving us an indication of the key transition points in their life when we they may be needing our advice and guidance.

How to View Status

To view the **Status** in the **Client Details** screen:

Open up the **Client** search screen and locate the clients you wish to view the **Status** for.

Make sure you have opened the record on the **Details** page (if you haven't, click on the **Details** tab (circled below in red)).



In the **Details** page for the client, we will be able to see whether or not a **Status** is already recorded. Across the top of the **Details** page is a blue bar with **Status**, **Status Verified** and **Status Expired** as shown below.

The screenshot shows a web interface for a client record. At the top, there are navigation tabs: Clients | Orgs | Contacts | Diary | Tags | Reports | Mini Guides | Vacancies. Below this, there are sub-tabs: Summary, Details, Intended Destinations, History, Relations, Notes, Plan, Benefits, and Qualls. The client's name is Memphis Tennessee, with a DOB of 14/09/1993 (16) and a Ref of 0101730. A green checkmark is visible next to the Ref. Below the client information, there is a 'Save' button and a 'Memphis Tennessee' logo. The 'Status' section shows a dropdown menu with 'NEET - Seeking employment/educ/training' selected. To the right, the 'Status Verified' date is 18/01/2010 and the 'Status Expires' date is 10/03/2010.

Status

The **Status** box shows you the current **Status** recorded for the client. It will reflect one of the DCSF categories which you can choose to describe what the client is doing. If no **Status** has been recorded for the client, it will read NULL.

Status Verified

The **Status Verified** box shows when the **Status** for the client was last confirmed. It is usually the last time that the client met with a PA or information was received about that client by the PA.

Status Expires

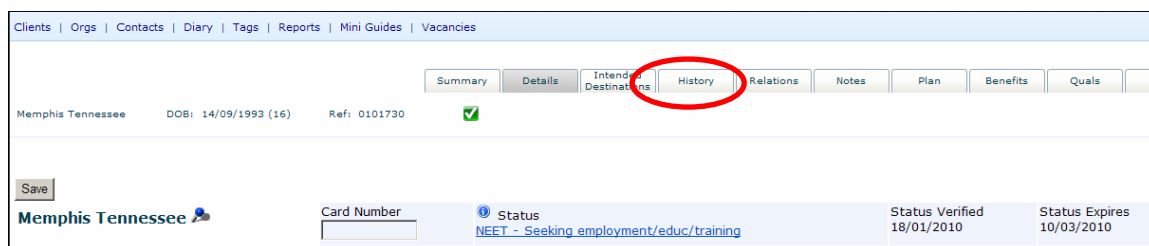
The **Status Expires** box shows us the date when the young person needs following up and checking to update what their current **Status** is. It gives an indication of the point of transition at which we need to follow up with the young person and ensure they receive any guidance or support in moving on. If the date appears in red in this box, it means that the follow up date is now in the past and it is important that you now get in contact with the young person and update their **Status** on the system.

So, by giving a quick glance at the box on the top of the young person's **Details** page, we can quickly see what they are doing now, when someone last saw them and how current the information about their status is.

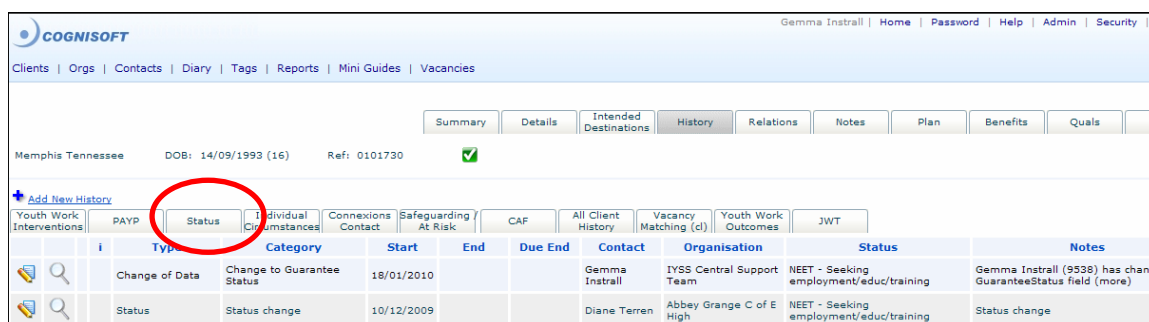
Viewing a **Status** in the **History** Tab:

Open up the **Client** search screen and locate the client you wish to view the **Status** for.

If you have opened the record on the **Details** page you will need to click on the **History** header tab as shown below.



This will open up the **History** Tab and show the **History Summary**. This will list all the **Contacts**, **Status Changes**, **Outcomes** and **Individual Circumstances**. In order to view just the **Status Changes**, you need to click the **Status** header and this will sort all the records and only show those that are **Status Changes**.



Recording a Status

Recording a Status for a Brand New Client

When you are creating a brand new client record, you click on the blue **Clients** link and, after running a **Search** to ensure that your young person does not already exist on the system, you click the **Add Client** link in the top left of the page.

This will bring up a new client entry page as shown. Once you have entered the details and clicked on the grey **Check Client** button, if there are no other young people that match the details you have entered, you will get a brand new **Client** screen.

Add Client

New Client (Basic Information)

*Please Use a minimum of 2 fields

Surname Minimum of 3 Char

FirstName

Use Sounds like Option for Names (this will substantially increase the returned records)

DOB

Post Code

To record the new **Status** for the client, there is a drop down box that appears on the right hand side of the new client **Details** page (as shown)

New Client Entry

Client Name Details

Title

Surname

Second Surname

First Name

Middle Name

Known As

Client Address Details

Flat Number

House No/Flat Block No

Street Name

Area if applicable

Selected for Evaluation

Opted out of Evaluation

Last Contact

Status

Scheme

Eligibility

Current\Last Occupation

Lead PA

Secondary PA

Other Advisor

Cohort Status

Centre

Alternate Centre

Caseload

Once you have completed all the details and the mandatory fields and registered a **Status**, if you **Save** the record, it will create the new young person on the system and you can view the **Status** in the top **Status bar** (circled below in red).

Clients | Orgs | Contacts | Diary | Tags | Reports | Mini Guides | Vacancies

Summary Details Intended Destinations History Relations Notes Plan Benefits Quails F

Memphis Tennessee DOB: 14/09/1993 (16) Ref: 0101730

Memphis Tennessee

Status Status Verified 18/01/2010 Status Expires 10/03/2010

Recording a Status for an Existing Client

Once you have found your young person using the **Clients** link and using the search screen, open up the record and click on the **History** tab.

Clients | Orgs | Contacts | Diary | Tags | Reports | Mini Guides | Vacancies

Summary Details Intended Destinations **History** Relations Notes Plan Benefits Quails F

Memphis Tennessee DOB: 14/09/1993 (16) Ref: 0101730

Memphis Tennessee

Status Status Verified 18/01/2010 Status Expires 10/03/2010

Opening up the [History](#) tab displays the overview of all the different [Status Changes](#), [Contacts](#) and [Individual Circumstances](#).

To add in a [Status Change](#), click on the [Add New History](#) link. This will open up a new record.

Save As New

[Return To History Summary](#)
[Client Details Page](#)

Client Ref: 0101730 Memphis Tennessee Mark History as Important: No

Type: Status
Category: Status change

Status: Further Education Old Status: NEET - awaiting an E2E place
Date Entered: 21/01/2010
Time Entered: 11:07:05
Organisation: 100283 IYSS Central Support Team
Occupation:

From [Type](#) choose Status and from [Category](#) choose Status Change (as shown above)

Note: Status Changes will not save without a Type and a Category.

From [Status](#) choose from the drop down menu. Descriptions and guidance as to what each of the categories means is available in the CCIS Requirements 2008-9 document.

Scroll past the system generated date and time to the [Organisation](#) field. For a [Status Change](#) the [Organisation](#) field needs to reflect the current or last [School](#) that the young person attended. Use the blue search button to locate the correct [School](#).

Type: Status
Category: Status change

Status: Further Education
Date Entered: 21/01/2010
Time Entered: 11:07:05
Organisation: 100283 IYSS Central Support Team

Occupation:
Course:
Partner Org:
Staff:
Start:
Due End:
Worker:
Evidence Received:

Search: [] Records: 10

- * None
- International Plc (A6644) Phone:0113 234 2636
- T P Technology (A8499) Phone:N/A
- V C Industries ltd (A10010) Phone:0113 3857800
- ** Link Training - Beauty Ther (A5796) Phone:0113 2445973
- ** Link Training - Catering (A6715) Phone:0113 2445973
- ** Link Training - Hairdressin (A4479) Phone:0113 244 5973
- *** Do Not Use - Oulton Hall H (A5141) Phone:0113 2821000
- *** Do Not Use - Oulton Hall H (A5847) Phone:N/A

Then you need to scroll down to the [Start](#), [End](#) and [Due End](#) dates and fill these in. (If in any doubt refer to the [IO Due End Dates](#) mini guide).

You can add any notes that you want to accompany the [Status Change](#) in the [Notes](#) box at the bottom.

Clicking [Save](#) will record the [Status Change](#) for you and this can be viewed by clicking [Return to History Summary](#) on the top left of the page.

Remember: only enter a Status Change if it is a change. If you are not changing the status, use Status Verification.