Clients moving out of area

How to 'close off' a client in IO Insight

There may be occasions where a client that you have been working with informs you that they have moved to another part of the country and are, therefore, no longer resident in Leeds and receiving your services.

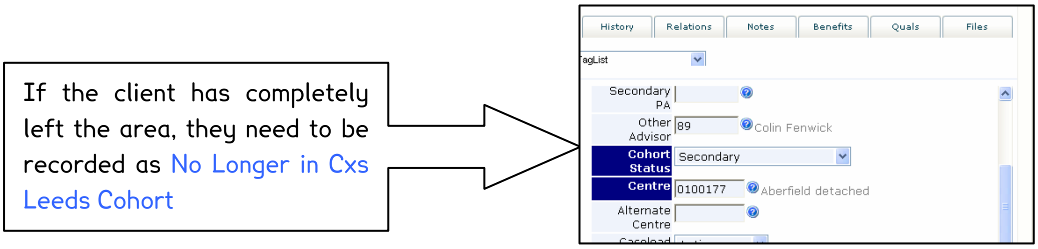
In these instances you will want to be able to record on IO Insight that this client is not only no longer on your caseload, but is also not going to be accessing services in Leeds. This guide is intended to show you how to complete all the fields that you need to 'close off' this client record.

'DFE guidance to Service Providers is that they should not close a young person's record until he/she has been identified in another area and the receiving Service has a record of that young person. It is appreciated that in many cases the young person can be identified as having left the area, but not where they have gone to. Service providers should not close a record without sufficient evidence that the young person has not simply moved to a new address within their own area.'

CCIS Requirements 2010/11

Marking the Change in Cohort Status

If this client has completely moved out of our Local Authority area, they are no longer part of our cohort. This means that we have to change the Cohort Status field on the client Details page. The Cohort Status field is on the right hand side of the Details page about half way down.



To change the Cohort Status field, you simply use the drop down menu to select the new category and click on it. You then need to click Save for it to log the change.

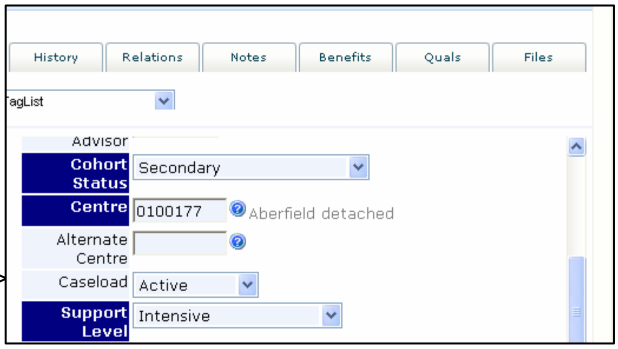
By marking this record as No Longer in Cxs Leeds Cohort, the DFE are made aware, through our monthly upload, that this client is no longer part of our cohort and shouldn't be counted as part of our figures. <u>It also means that when your manager runs the caseload report this young person will no longer appear on your caseload.</u>

This cohort status of 'No Longer in Cxs Leeds Cohort' should only be used for indicating a client moving out of area. It is not a caseload indicator. Marking this on a client record will not remove this client from your active caseload.

Recording the Change in Caseload

Now that the client is no longer working with you, you will want to indicate that they are no longer on your active caseload. This is done by changing the Caseload indicator, which is found on the client Details page. The Caseload indicator is found on the right hand side of the client Details page about two thirds of the way down.

Now that the client is no longer working with you, you need to mark them as Not Active on your caseload.



As before, select the correct option from the drop down menu and then remember to Save the record.

Changing the Caseload indicator will make sure that when you search for your active clients, this record will no longer appear. It will also show other users of the system that you are no longer working with this client.

Changing the Lead PA field

It is **not** recommended that you change the Lead PA field or remove your name from the Lead PA field leaving it blank.

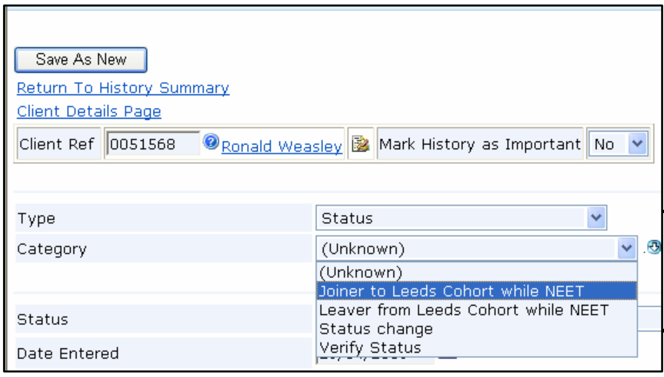
The reason for this is that the new Local Authority area that the client has moved to will require a copy of the clients record from IO Insight. This will enable them to see what work has been done with the client and offer continuity of service. It is useful for this new Local Authority to know which PA last worked with the client, as they may want to get in contact to gain further information or speak to you about a particular issue. If you remove yourself from the Lead PA field, the new Local Authority will not know who took lead responsibility for service delivery to this young person and who to contact for further information.

Changing the Status

By changing the Cohort Status and the Caseload Indicator, you have already marked that this person is no longer living in Leeds. You now need to change the status and what you change it to will depend on how much information you have about the client.

If the client was NEET when they left the area, there is a History record to complete to indicate a client who moves to another area whilst NEET. This is recorded by opening the client History page.

Once the History page is open, click on the Add New History link.



From the Type, choose Status

From Category choose Leaver from Leeds Cohort whilst NEET.

In the Notes section you can give details of any information that you have about where the client has moved to or who they are going to be working with etc. Clicking Save will log this new History record.

This won't have changed the status (situation) of the client, but it will have logged that they were NEET when they left our area and this is reportable to the DFE in our monthly upload.

If the client has moved out of the area and you know what they are doing

If the client has moved to another area but you know what they are doing, you need to record the status that reflects what current activity that client is in. For example, if you know that a client is at college studying out of area, you would record the status as Further Education.

This way, we can clearly see what the client is doing and it most accurately reflects the information we have about them. It also allows us to see whether the intervention of the Connexions service here in Leeds has had a positive outcome for the client, which is one of the indicators we are measured on.

The currency of the status on this client will naturally expire over a period of time, however, you do not need to worry about this because we have already removed them from our monthly figures to the DFE by marking them as No Longer in Cxs Leeds Cohort and they will not show in our local reporting which is only done on Primary Cohort clients.

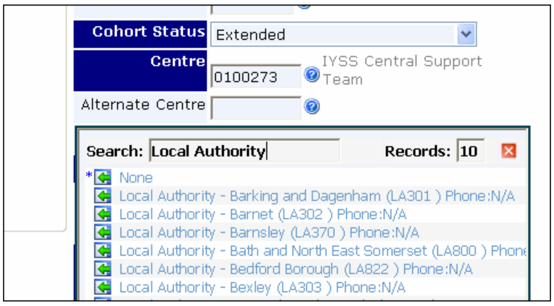
If the client has moved out of the area and you don't know what they are doing

If the client has moved to another area and but you do not have any information about what they are doing, the status should be recorded as Cannot Be Contacted. This indicates that we have no information about what the current activity the client is undertaking in their new area.

Again, this status will expire over a period of time but as above, this is not something to be concerned about, as the record has been removed from local and national figures for Leeds.

Adding in the Alternate Centre

As well as logging the change to Cohort Status, Caseload Indicator and Status, we also need to report to the DFE information about where the client is moving to. This is done by filling in the Alternate Centre field on the client Details page.



Use the blue search bubble to look for the Local Authority that the client is moving to. Click the green arrow next to the correct one to enter it.

Click Save to record the change.

If you are unsure which local authority they are moving to, use the Local Authority – Unknown Area record.