Reference Guide

Involvements

Creating an Involvement Record

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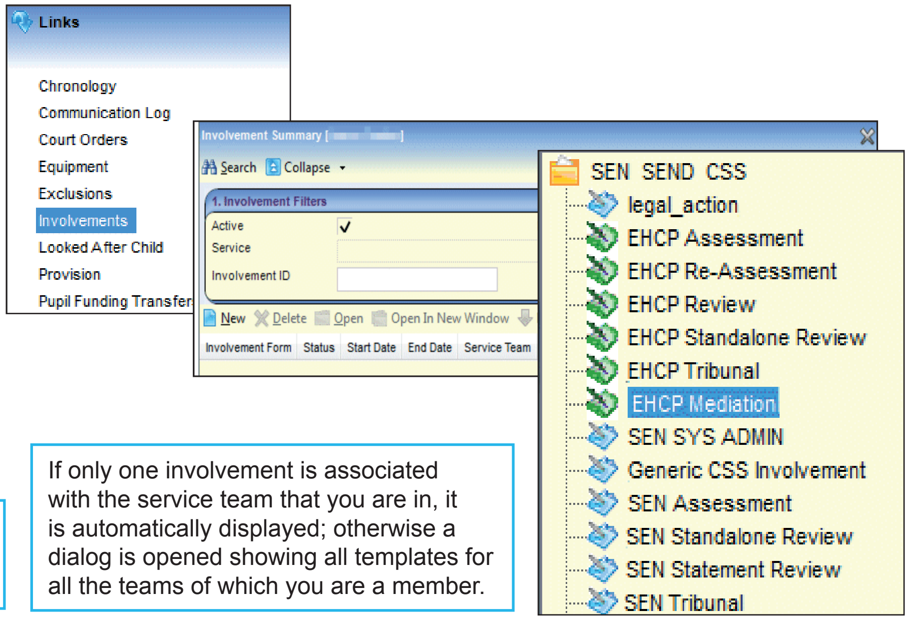
An involvement record must be associated with an involvement form.

1. Select **Home | My Involvements** or **Focus | People | Person/Students | Links | Involvements** to display the **Involvement Summary** dialog.
2. Click the **Search** button to display any existing involvement forms.
3. Click the **New** button to display the **Choose an Involvement Form** dialog.
4. Highlight the required **Involvement Form**, then click the **Select** button to display the **Involvement Details** panels.

For more information on creating an involvement form, see *RG_Involvements _Creating an Involvement Form*.



If only one involvement is associated with the service team that you are in, it is automatically displayed; otherwise a dialog is opened showing all templates for all the teams of which you are a member.

Completing an Involvement Record

To complete the involvement record:

Data automatically populates certain fields (Service Team, Subject, Caseworker, etc) on the **Involvement Details** panels. If created from My Involvements, the subject must be manually associated.

1. Enter the required information; this varies depending on the involvement form selected.

   Some fields are mandatory depending on the involvement form, e.g. for Legal Actions involvements, **Status** (*Lookup_ID 1052)* and **Reason** (*Lookup_ID 1053)* are mandatory. Mandatory fields must be completed before the involvement record can be saved.

   Additional mandatory fields can be set via **Tools | Set Mandatory Field | Mandatory Field Admin**. For more information, see the v4 Client online help file.

2. Click the **Save** button.

   After the involvement is saved, the following updates are made:

   - A workflow is initiated and a message is displayed on the **Home Page** | **My Workflow Messages**.
   - The **Summary Timeline Details** panel is added to the involvement record; the timeline can be opened by clicking the **Launch** button.
   - The caseworker's **My Involvements** list is updated.
   - The **Social Network** for the student or person is updated.
   - The **Chronology** for the student or person is updated.

Related Reference Guides

- RG_Involvements_Creating an Involvement Form
- RG_Involvements_Creating/Viewing EHCP Involvement Forms
- RG_Involvements_Linking a Timeline to an Involvement
- RG_SEN_Assessment Field Interdependencies
- RG_SEN Statement Field Interdependencies
- RG_EHCP Assessm't Field Interdependencies

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