



Involvements

Linking a Timeline to an Involvement

A timeline is a set of predefined activities that a caseworker or administrative officer follows when dealing with a particular type of involvement. As these activities are intended to be followed each time a new involvement is created, the timeline can be re-used by associating an instance of it with an involvement form.

When a timeline is associated with an involvement form, it is given a start date and the activities are displayed as workflow messages on the Caseworker's or Administrative Officer's home page, after the number of predefined days have elapsed.

For Child Support Services (CSS), a timeline must be linked to an involvement form for the timeline to function correctly.

For Special Education Needs (SEN) and the Education, Health Care Plan (EHCP) it is optional to link a timeline to an involvement form.

A timeline is linked to an involvement form at the timeline design stage.

Opening the Timeline Design

To open the timeline design:

1. Select **Tools | Administration | Timeline | Timeline Design** to display the **Timeline Enquiry** page.
Click the **Search** button to display the browse list of timelines that are already linked to an involvement form.
2. Click the **New** button to display the **New Timeline** design page.

The screenshot shows the 'Timeline Enquiry' dialog. It has a search bar and a list of timelines with columns for 'Timeline Name' and 'Description'. The list includes:

Timeline Name	Description
A CSS Timeline	CSS Generic Timeline
An SEN Timeline	SEN Review Timeline
EHCP Assessment Timeline	EHCP Assessment Timeline

3. On the **Basic Details** panel, enter a **Timeline Name**.
4. If required, enter a **Description**.
5. If required, select a **Working Day Base**.

The screenshot shows the 'New Timeline' dialog on the '01. Basic Details' tab. It has fields for 'Timeline Name', 'Description', and 'Working Day Base'. The 'Timeline Name' field is highlighted with a red border.

Selecting an Involvement Form

1. On the **Involvement Forms** panel, click the **Add** button to display the **Involvement Form Link** dialog.

The screenshot shows the '02. Involvement Forms' dialog. It has tabs for 'Involvement Form', 'Involvement Form Type', 'SEN Assessment Source(s)', and 'SEN Assessment Type(s)'. A right-hand sidebar contains 'Add', 'Edit', and 'Remove' buttons.

2. Click the **Involvement Form** browse button to display the **Involvement Form Enquiry** dialog.

The screenshot shows the 'Involvement Form Link' dialog. It has tabs for 'Save', 'Involvement Form Link', 'SEN Assessment Source(s)', and 'SEN Assessment Type(s)'. The 'Involvement Form Link' tab is selected, showing a browse button for selecting an involvement form.



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3. Select a **Form Type** according to whether the involvement is CSS, SEN or EHCP related.
4. Click the **Search** button to display a list of involvement forms.

5. Highlight a record and click the **Select** button to return to the **Involvement Form Link** dialog; the **Involvement Form** and **Involvement Form Type** fields are populated.

If you select an SEN involvement form, see the following note before proceeding to step 6.

6. Click the **Save** button to return to the **New Timeline** design page.

Before the new timeline design can be saved, it must contain at least one activity. For more information, see *RG_Timelines_Creating a Timeline*.

A timeline can be deleted from an involvement. For more information, see *RG_Timelines_Deleting a Timeline*.

NOTE: If an SEN Involvement Form is selected in step 5, then the **SEN Assessment Source** (*Table_ID 1052*) and the **SEN Assessment Type** (*Table_ID 0315*) panels are populated.

Select the combinations of **SEN Assessment Sources** and **SEN Assessment Types** to be used for this timeline.

01. Involvement Form Details

Form Description

Form Type

CSS Legal Actions Involvement
EHCP Assessment Involvement
EHCP Re-Assessment Involvement
EHCP Review Involvement
EHCP Standalone Review Involvement
EHCP Tribunal Involvement
Generic CSS Involvement
SEN Assessment Involvement
SEN Standalone Review Involvement
SEN Statement Review Involvement
SEN Tribunal Involvement

01. Involvement Form Details

Form Description

Form Type

Generic CSS Involvement
Generic CSS Involvement
generic_involvement
Generic CSS Involvement
Generic CSS Involvement

5 Records Found

Involvement Form Link

Involvement Form: SEN Assessment Involvement

Involvement Form Type: SEN Assessment Involvement

SEN Assessment Source(s)

Display for selection	Description
<input type="checkbox"/>	Child Development Advisor
<input type="checkbox"/>	Clinical Psychology
<input type="checkbox"/>	Current School
<input type="checkbox"/>	Department of Social Services
<input type="checkbox"/>	Early Years Setting
<input type="checkbox"/>	Education Welfare Officer
<input type="checkbox"/>	Educational Psychologist
<input type="checkbox"/>	Educational Welfare Officer

SEN Assessment Type(s)

Description	
<input type="checkbox"/>	Educational Psych
<input type="checkbox"/>	Enquiry
<input type="checkbox"/>	Further Assessment
<input type="checkbox"/>	Initial Assessment
<input type="checkbox"/>	LEA Transfer
<input type="checkbox"/>	LEA Transfer Mid Assessment
<input type="checkbox"/>	Other
<input type="checkbox"/>	School Action Plus



Related Reference Guides:

- RG_Involvements_Creating an Involvement Form
- RG_Timelines_Creating a Timeline
- RG_Timelines_Deleting a Timeline