



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.

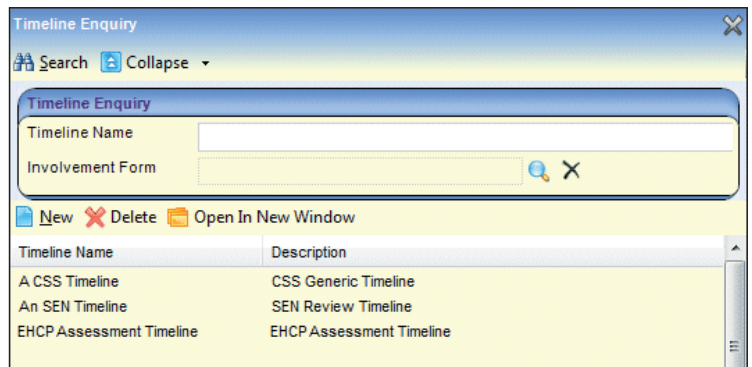
Opening the Timeline Design

To open the timeline design:

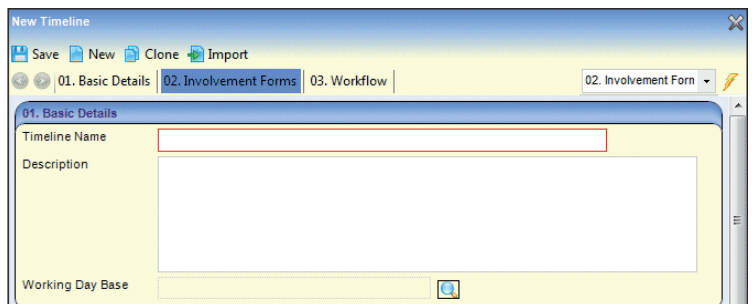
1. Select **Tools | Administration | Timeline | Timeline Design** to display the **Timeline Enquiry** page.

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.

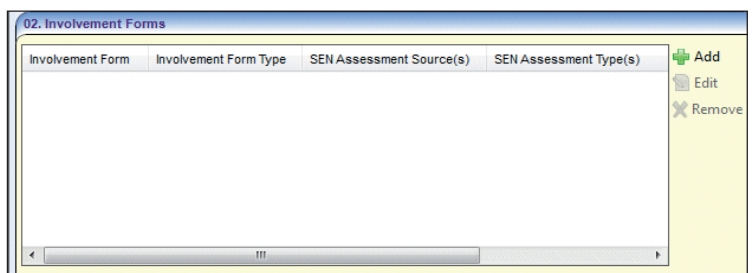


3. On the **Basic Details** panel, enter a **Timeline Name**.
4. If required, enter a **Description**.
5. If required, select a **Working Day Base**.

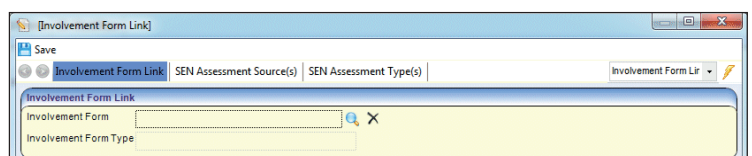


Selecting an Involvement Form

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



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





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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.



Related Reference Guides:

- [RG_Involvements_Creating an Involvement Form](#)
- [RG_Timelines_Creating a Timeline](#)
- [RG_Timelines_Deleting a Timeline](#)