Due End Dates in Insight

What the due end date means on the client activities page.

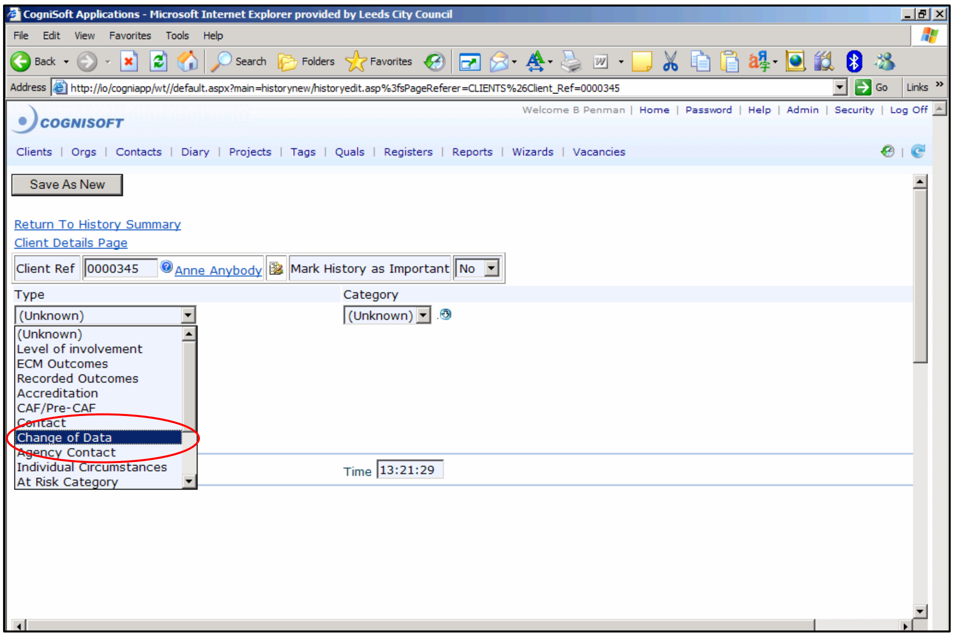
When you record an Activity record (also called a History record) in IO Insight, there are several date fields at the bottom of the record that you have to fill in. This mini guide is meant to help you make sense of what each of these date fields mean and how to complete them correctly.

Let's start with an example:

You are working with a young person, Anne, and she is 16 years old and has just left school and started at sixth form college. Anne is already on the system but logged as being Registered at School or Educational Establishment.

Let's start with recording a Status Change for Anne.

We do this by clicking on the Client link, we then search for Anne's record and once we have the record open, we click on the Activities tab. We then click on the Add New Activities link to get the following page:

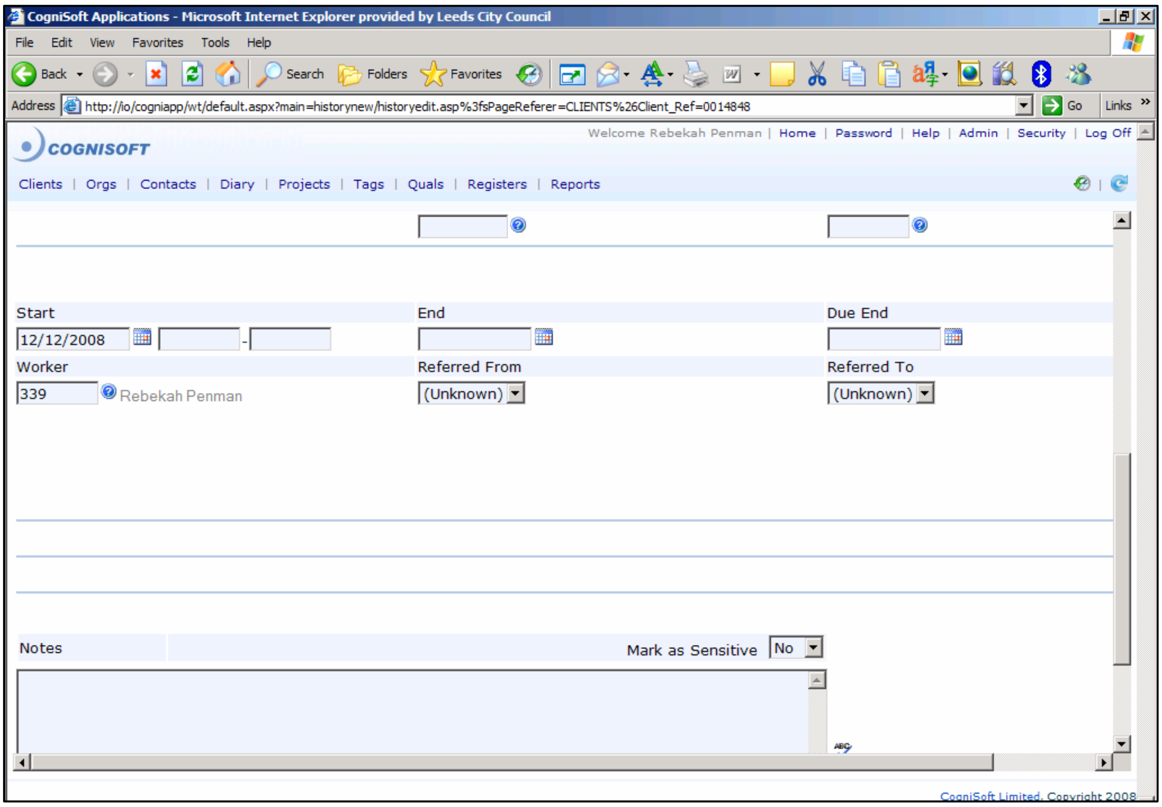


You then need to choose Type: Change of Data and Category: Status Change and then select the Status: Sixth Form College.

Note: Activities will not save without a Type and Category

Directly below the Type and Category and Status fields is a date and time field. This is a system generated field and you cannot make changes to this field.

If you scroll down towards the foot of the page, you will see that three date fields come into view.



The Start date

The Start date is the date that the status changed i.e. the date you were notified of the young persons change in status.

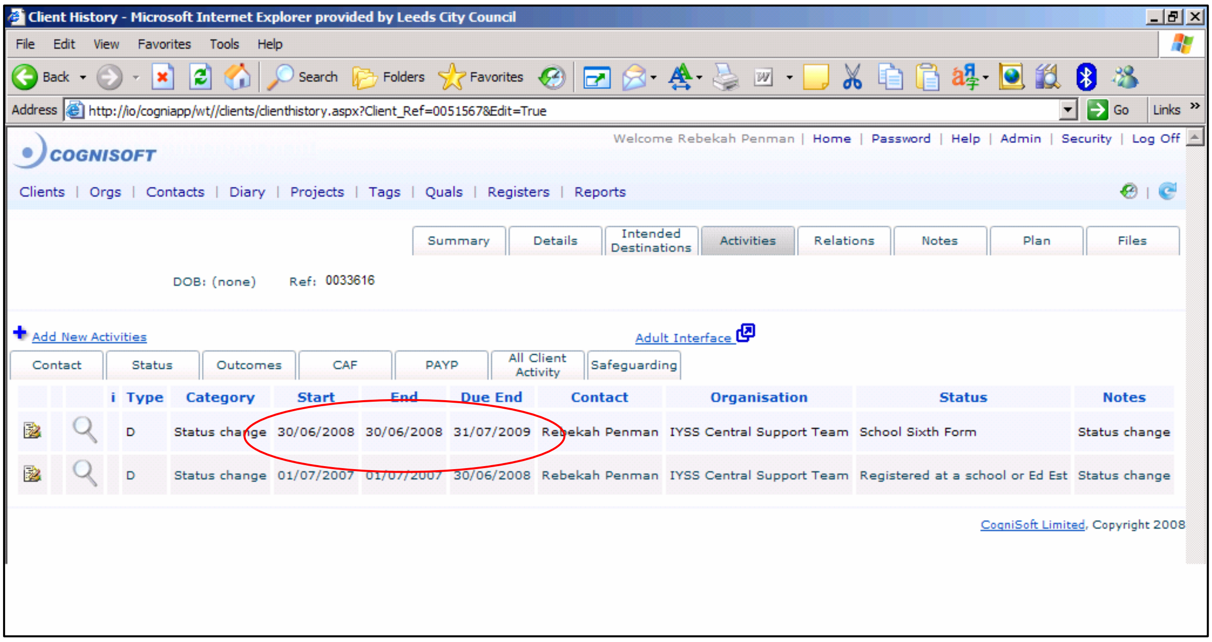
The End date

The End date is the end date that the status changed. This is going to be the same as the Start date.

The Due End date

The Due End Date is the date that Anne's college course will finish.

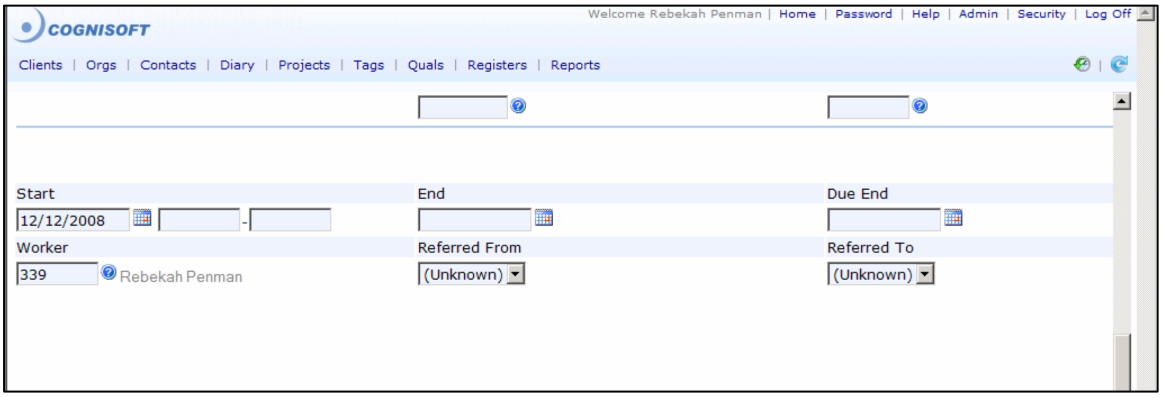
When we now save the record, we can see that all three dates appear in the columns in the history summary page.



If we now look at adding in a one to one contact to Anne's record we can have a look at the same date fields and how they work here.

As before, we click on the Add New Activities link.

We choose Type: Contact (Connexions) and Category: One to One Contact
If you then scroll down past the system generated date and time box to the three date boxes we have seen before.



The Start date

This is the date that you met up with Anne for the one to one.

The End date

The End date is the date that the interaction ended. Unless you have been running a residential, this date will be the same as the Start date.

The Due End date

The Due End date relates to Anne's status. It is the date that Anne's college course will finish. So it stays the same date as the Due End Date in the Status Change.

Unless Anne's status changes and she is no longer at sixth form college, the Due End Date for all subsequent Contacts will be the same as for the Status Change. This is because the college course has a finite finishing date.

What happens if you are working with a young person whose status doesn't have a finite finishing date?

If we look at another example:

You are working with a young person, Marmaduke, and he is 17 years old and left school last year and hasn't been doing anything since. Marmaduke is already on the system but is still logged as being Registered at School or Educational Establishment.

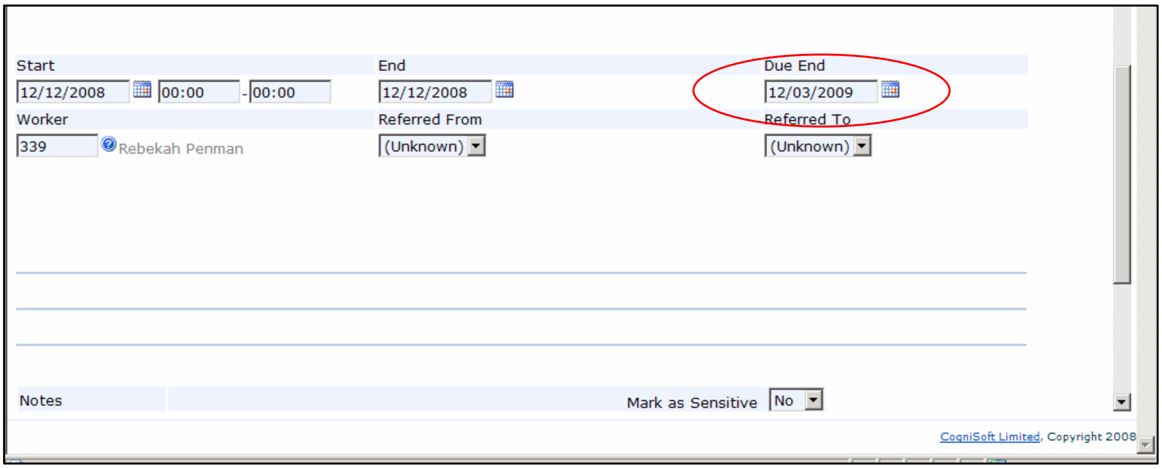
If we start with the Status Change.

After we have opened up the Activities page on Marmaduke's client record and once we had clicked Add New Activities we choose Type: Change of Data and Category: Status Change and from Status: Seeking Education, Employment or Training.
As we scroll down past the system generated date, we get the same three date boxes as before. The Start date and the End date are the same as with our previous example.....the difference comes with the Due End Date.

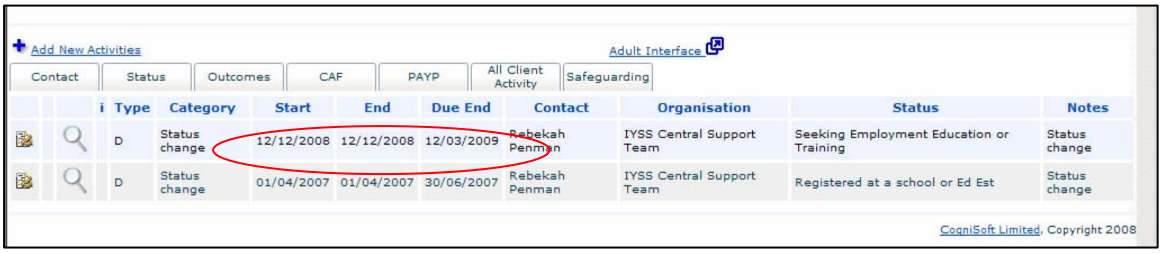
The Due End date

Because Marmaduke is NEET, his status doesn't have a finite end date so we have to use the currency rules to work out the Due End date. (The currency rules can be found at the back of the CCIS Requirements 2008-9 Document).
A NEET young person has a currency of 3 months. Effectively this means that as a PA, you need to check in with that young person at intervals of no more than 3 months to make sure that their status is kept up to date on the system and that they are receiving all the support and help that they need to move from NEET to EET.

So, for Marmaduke we set the Due End date for his status change at 3 months in advance from the Start date. It will look something like this..



Once we have saved this record, we can view the overall change on the History Summary page.



So, if we were now to record a one to one contact – as before, we click on the Add New Activities link then we choose Type: Contact (Connexions) and Category: One to One Contact.
If you then scroll down past the system generated date and time box to the three date boxes we have seen before.

The Start date

This is the date of your one to one with Marmaduke.

The End date

This is the end date of the one to one with Marmaduke, so unless you are running a residential, it will be the same as the Start date.

The Due End date

Here we use the currency rules to calculate the Due End date in the same way that we did for the Status Change. The currency for Marmaduke is for 3 months, so the Due End Date is 3 months in advance of the Start date.

Once saved, this will give a history summary that looks a bit like this:


Add New Activities

Adult Interface

Contact | Status | Outcomes | CAF | PAYP | All Client Activity | Safeguarding

		i	Type	Category	Start	End	Due End	Contact	Organisation	Status	Notes
			C	One to one personal contact	14/12/2008	14/12/2008	14/03/2008	Rebekah Penman	IYSS Central Support Team	Seeking Employment Education or Training	One to one personal contact
			D	Status change	12/12/2008	12/12/2008	12/03/2009	Rebekah Penman	IYSS Central Support Team	Seeking Employment Education or Training	Status change
			D	Status change	01/04/2007	01/04/2007	30/06/2007	Rebekah Penman	IYSS Central Support Team	Registered at a school or Ed Est	Status change

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You will notice that for a young person such as Marmaduke, who has a Status that doesn't have a finite end date, the dates in the Due End date column will change with each contact you enter. This is unlike Anne in our previous example where the Due End date stayed the same because her college course had a finite date. This is because each time you meet with Marmaduke, you are in effect confirming that he is still NEET and therefore setting yourself a date in the future before which you need to check in with him.

Due End Dates are there to give you an idea of when these young people are approaching transition periods in their lives and when you need to be contacting them to offer advice and guidance about where and what they do next. The Due End Date also tells us how recent the status information is and when we need to be checking that.

All three date fields need to be filled in on IO Insight for any History type.