

# CRIB SHEET – COMPLETING REVIEWS

## Recording that a Scheduled Review has been Completed

One month before a Review is due to be carried out for a client, if you are the key worker, you will automatically receive a workflow job on your Workflow In Tray entitled “**Review**”.

A screen similar to the following will be displayed:



This job is to notify you, as the key worker of the client that a review is due to be carried out.

- To view further details and work on the “Review” jobs that are displayed on your in tray, click on the job type “Review”.

The following screen will be displayed:

- Click on the client you wish to update then click on **Work On**.

The following screen will be displayed:

You should always access reviews that are due via Workflow to ensure Workflow is kept up to date and accurate.

- The review you have carried out will be entered in the Review Due Date & Type summary list on the left hand side of the screen. Click on the review to display the details on the right side of the screen.
- Enter the date the review was completed in the Comp field.
- If the date entered in the Comp field is later than the Due Date then enter 'Delayed' in the Delay Rsn. field.
- Click on **Save**.

The following screen will be displayed:

Note: the Review workflow job will have disappeared from your workflow intray

## Recording when the next Scheduled Review is due

- Press F6 to create a new review.
- Enter the appropriate review type in the Review Type field.
- The Subject field will automatically complete with the name of the client you are recording the review for.
- Enter the date the review is due in the Due Date field.
- Click on

The review is now set up and the workflow job “Review” will automatically appear for the key worker four weeks before the review due date.