

Chapter 19 - Late amendments to visits

SUMMARY OF KEY POINTS – see rest of chapter below for full details

- **Any changes to proposed visit plans should be clearly recorded.**
- **Minor amendments can be recorded on EVOLVE as a footnote at the end of a visit form**, without necessarily requiring the form to be resubmitted and approved again by managers.
- **Details of any significant changes to visit plans that have already been approved or submitted for approval, MUST be resubmitted to all relevant managers for additional approval.**

19.1 Who should be informed of changes to the visit plans?

- If there are significant late changes to visit plans that have already been approved or submitted for approval, the Visit Organiser should notify all relevant managers and obtain additional approval for the proposed changes.
- Depending upon the significance of the changes, the Visit Organiser may also need to inform the other group leaders, the young people, and their parents/guardians.
- Significant amendments might involve changes to the following:
 - destination;
 - group members and numbers (especially if numbers increase);
 - group leadership;
 - staffing and staff ratios;
 - accommodation base;
 - activity programme or itinerary;
 - risk assessment control measures;
 - places to be visited;
 - insurance company used;
 - means of transport;
 - emergency home contacts;
 - medical/special needs of group members (inc. staff).

19.2 How to make amendments after submitting a form to the EVC for checking and processing (before the EVC has submitted it on to the Headteacher for approval):

1. Amendments to a few sections (Staffing, Attendees, and Departure/Return Times) can still be made directly by the Visit Organiser. To do so:
2. Click “Track” from the home page
3. Click “Submitted” visits
4. Click the purple “View” icon beside the visit you wish to open and amend
5. Click the orange edit icon to open and then edit the relevant sections
6. Click “Continue” to save changes (the page may then need to be refreshed to show all changes)
7. For other amendments to the form, the Visit Organiser should go to the bottom of the form and click “Add Note” and then either:
8. Add and send a note to the EVC requesting that the form is returned for further editing (the EVC can return the form by going to “Track” > “Draft” visits > Purple “View” icon to open form > click “Return” at bottom of form, or
9. Add and send a note to the EVC asking them to make specified changes to the form (the EVC can then edit the form by going to “Track” > “Draft” visits > orange edit button > make changes > “Continue” to save

19.3 How to make amendments after the EVC has checked and processed the form, and submitted it on to the Headteacher for approval:

1. Amendments to a few sections (Staffing, Attendees, and Departure/Return Times) can still be made directly by the Visit Organiser – see guidance notes immediately above
2. For other amendments to the form, the Visit Organiser should view the form (by going to “Track” > “Draft” visits > Purple “View” icon) and click “Add Note” at the bottom of the form:
3. Add and send a note to the Headteacher requesting that the form is returned to the EVC for further editing (the Headteacher can return the form by going to “Track” > “Draft” visits > Purple “View” icon to open form > click “Return” at bottom of form)
4. The EVC can also request directly that the visit is returned by opening “Track”, locating the visit (in “Submitted” or “Approved” folders) and clicking the “Recall” icon
5. The Headteacher can return the visit by opening “Track”, locating the visit (in “To be Authorised” or “Approved”), opening the visit form by clicking on the purple “View” icon, and clicking “Return” at the bottom of the form

19.4 How to make amendments after the visit has been authorised by the Headteacher:

1. Amendments to a few sections (Staffing, Attendees, and Departure/Return Times) can still be made directly by the Visit Organiser – see guidance notes above.
2. For other amendments to the form, the Visit Organiser should open and view the form (by going to “Track” > “Draft” visits > Purple “View” icon) and click “Add Note” at the bottom of the form.
3. Add and send a note to the EVC requesting that the form is recalled for further editing.
4. The EVC can send a request to the Headteacher asking that the visit is returned by opening “Track”, locating the visit (in “Approved” folder) and clicking the light blue “Recall” icon (beside the purple “View” icon)
5. The Headteacher will be notified and can unlock and return the visit form by opening “Track”, locating the visit (in “Approved” folder), opening the visit form by clicking on the purple “View” icon, and clicking “Return” at the bottom of the form. This will return the form to the EVC “Draft” folder where it can be opened and edited by the EVC or returned to the Visit Organiser if requested.
6. N.B. Once you have clicked Recall, the visit is NOT automatically returned to you - you will need to wait for the visit to be returned to you by the person with whom it is currently waiting.

19.5 How to change the date of an approved visit

1. If the date of the visit is still in the future then either:
 - a) the EVC can "recall" the visit from the Head/Service Manager or Lead Approver in order to edit the visit form and then resubmit for approval *or*
 - b) you can 'Add Note' for the attention of the Lead Approver, giving the revised date/s. The LA can then make this change for you, and a note will also be added to the Visit Form regarding this change.
2. If the original date of your visit has passed then please contact your LA who can amend your Visit Form with the new date, and a note will also be added to the Visit Form regarding this change.

19.6 How to cancel a visit (i.e. if the visit is no longer going ahead) before it has been submitted to the EVC

1. The Visit Organiser should view the form (by going to “Track” > “Draft” visits > Purple “View” icon)
2. Click “Cancel” at bottom left of the form.
3. Confirm and state reason.

19.7 How to cancel a visit (i.e. if the visit is no longer going ahead) after it has been submitted to the EVC/Headteacher

1. The Visit Organiser should view the form by going to “Track” > locating the visit (in “Submitted” or “Approved” folder) > Purple “View” icon) and click “Add Note” at the bottom of the form
2. Add and send a note to the EVC and Headteacher requesting that the form is cancelled (the EVC/Headteacher can cancel the visit by going to “Track” > locate the visit (in “Draft” or “To be Authorised” folder) > Purple “View” icon to open form > click “Cancel” at bottom left of form > Confirm and state reason