

# Help Sheet

## Creating a Batch Visit

- A 'Batch Visit' can be used when you wish to submit an e-Go form for a series of repeat day visits to the same Provider and/or location, usually involving the same group of participants and staff.
- Once a 'Batch Visit has been created and approved for the first date of the Batch Visit period, the remaining dates can be individually added to the approval. The original form does not need to be re-submitted to the Outdoor Education Unit for each of the individual visits as the approval covers the activities for the entire batch period listed.
- Each new date must be added prior to the visit departing,. This will generate a new visit in the system that is automatically set to approved. The additional dates can be added at any point right up until the time the new visit departs.

*E.g. a Batch Visit would be suited to a group going horse riding to the same Provider/venue each week for an entire term. Initial approval would be given in advance for the entire 'Batch Visit period' and then the individual visit dates would be added before each visit departs.*

### Period of Approval -

The period of approval should follow natural cut-off points (e.g. a 6 week block or the end of term) and not be extended over too long a period. The length of the period covered by a batch visit will be considered as part of KCC approval and may be altered to ensure that all visits are reviewed on a regular basis. The nature of the proposed activity may have an impact on the batch period that can be approved, and you will be advised if the Outdoor Education Unit considers the period of cover needs to be reduced.

### How to Create a Batch Visit -

- 1) Create a new visit using the red "New Visit" button. The departure and return date of the day visit must be the date of the **first planned visit in the batch** (not the entire batch period - which is added later in the process).
- 2) Confirm the visit is a batch visit when you get to the screen below. You need to enter the dates of the **first** and **last** visit planned for the Batch Visit period. You will not be able to add additional dates outside this period for the batch visit once the visit is created.

**Batch Visit (Y/N)** \* Yes

Period Start Date 01-Dec-10

Period End Date 20-Jul-11

**Confirm it is a Batch Visit. Enter the first and last dates in the 'batch period' to be approved..**

**To get to this screen please click "New Visit" and work through the visit creation process.**

3) Continue with the rest of the visit creation process as with any other visit.

4) Once your Batch Visit has received LA Approval you will be able to add the additional dates for each of the individual visits.

To do this you will need to go back and open up the original approved visit and use the **“Add another date”** button (see the example below). LA approval will be *‘subject to’* this being done. Any additional visit dates that are added will not have LA Approval.

You can add additional dates at any time before each specific visit departs. You do not need to pass on or submit any of these individual visits created within the Batch Visit approval, as these are submitted automatically by the system.

5) If the Visit Leader, Provider or activities need to be changed for any reason, you will need to contact the Outdoor Education Unit via your EVC / Headteacher or AYO as a Batch Visit is approved *‘subject to’* these aspects of the visit remaining constant.

To get to this screen please open the original Batch visit that was approved.

Do this by clicking on its name or searching for it under the *‘Visits’* search function in the main toolbar.

**Click the “Add another date button”**

**You will need to enter –**  
- a new date  
- emergency contact details  
- participant numbers.

**The system will now create a new visit. The visit will have the status of “approved” so it is not necessary to re-submit**

| Establishment | Establishment Type | Postcode | Telephone | DfES |
|---------------|--------------------|----------|-----------|------|
| Remove        | Test Establishment |          |           |      |

| When            | Action               | From     | Pass to  | Comments / Message                                      |
|-----------------|----------------------|----------|----------|---|
| 01-Dec-09 09:37 | Visit created        | Test EVC |          | Initial visit details entered                           |
| 01-Dec-09 09:46 | Visit details edited |          | Test EVC | Visit status was not changed as a result of this action |
| 01-Dec-09 09:46 | Visit details edited |          | Test EVC | Visit status was not changed as a result of this action |

### Before each visit departs please check –

1. The additional date has been added to the overall Batch Visit approval, and the e-Go system has created an approved visit specifically for the date of your individual visit.

2. Check that the information for that date is correct.