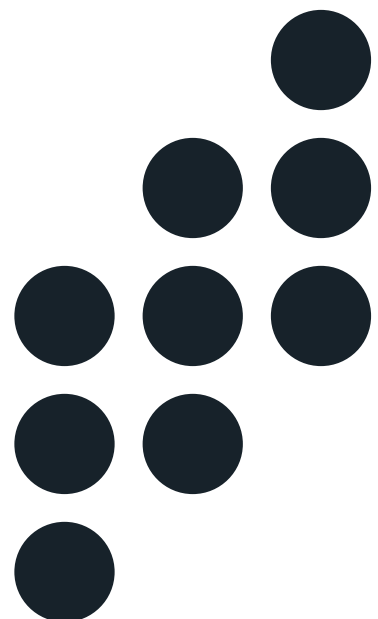




3sysACADEMIC

Pastoral Management

User Guide



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CHAPTER 1

Introduction

Welcome to the *3sysACADEMIC Pastoral Management User Guide*.

This chapter discusses the following:

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About the Pastoral Management Module

The Pastoral Management module allows users to record and track a range of emotional and behavioural issues affecting the wellbeing of pupils. As well as logging pastoral issues, the software enables you to add notes and time-bound actions to each instance, which then link to the relevant pupil(s) personal record. Other features include:

- » Tailored notifications to make relevant staff aware of record changes.
- » Soft and hard record deletion options, which ensures greater control over data removal.
- » Bulk transfer of record / action ownership between staff.
- » Record archiving.

Using the Pastoral Management module, you can:

- » Record pastoral management issues for individuals or groups of pupils.
- » Add notes and actions to records.
- » Search records.
- » View and edit pastoral records.
- » Reassign pastoral records and actions in bulk using the **Transfer of Ownership** function.
- » Delete pastoral records. (Whether you have access to 'Soft' delete and 'hard' delete options will depend upon your profile permission settings.)
- » Create and update pastoral record types and categories.
- » Complete Getting It Right For Every Child (GIRFEC) forms. (Scottish Schools Only.)
- » Download a report summarising child protection concerns. (Scottish Schools Only.)
- » Receive automatic banner alerts and emails when a new pastoral record or note is created that you need to action, enabling you to respond promptly. Other alerts highlight changes made to records and are for information only.

Via profile settings, System Administrators set which Pastoral Management module functions users can access and whether the **Notifications** function is in use. They can limit users' access to one or more specific functions or set them as Pastoral Management Administrators, who have full access to the **Pastoral Management** module.



For more information about setting up the Pastoral Management module, System Administrators should see the *3sysACADEMIC Pastoral Management Setup Guide*, available from our Customer Centre.

For details, see:

- » "About the Pastoral Management Dashboard" on the next page.
- » "About Pastoral Management Notes and Actions" on page 10.
- » "About Pastoral Management Module Notifications" on page 12.
- » "About GIRFEC" on page 13.
- » "About Adding Pastoral Records" on page 16.
- » "About Maintaining Pastoral Records" on page 26.
- » "About Maintaining GIRFEC Forms" on page 36.
- » "About Deleting Pastoral Records" on page 42.
- » "About Transfer of Ownership" on page 58.
- » "About Archiving Pastoral Records" on page 66.
- » "About Pastoral Record Reporting and Auditing" on page 72.



Fictitious, example data is used throughout this guide to aid users' understanding. Any resemblance to real persons (living or dead), or actual contact details, events, incidents, organisations or locations is purely coincidental.

About the Pastoral Management Dashboard

The **Pastoral Management Dashboard** gives you an overview of pastoral management records held on your system. You can access it by going to **Pastoral / Behaviour > Pastoral Management > Dashboard**.

The screenshot shows the 'Pastoral Management Dashboard' with the 'Requires Action By: Me' filter selected. The table displays the following records:

Actions	Unread Changes	Pupil Name(s)	Heading	Raised by	No. of open actions	Action Summary	Record Reason(s)	Action by Date	Action by	Last modified by	Follow Up
		CHARLES, Emily BURGESS, Andrew P PHILLIPS, James D	Poor attitude in Chemistry Lessons	BOULDER, Brian James	1	Update class layout.	In School Incidents	17/02/2020	Form Tutor	31/01/2020, STRINGER, Robert	
		ABBOTT, Isabel Francesca	Anxiety Issues	BAKER, Molly B	1	Arrange counselling.	Counselling Issues	04/02/2020	Form Tutor	03/02/2020, STRINGER, Robert	
		BURGESS, Andrew P	Uncharacteristic rudeness and poor behaviour	RANKIN, Katie	2	Review in 2 weeks	In School Incidents	13/03/2019	Form Tutor	27/02/2019, BRYANT, Melanie	
		BURGESS, Amanda J BURGESS, Andrew P	Issues at home	BRYANT, Melanie	1	Follow up Counselling Session	Home Circumstances, Counselling Issues	15/02/2019	Form Tutor	14/02/2019, BRYANT, Melanie	
		BURGESS, Andrew P	Absent from lessons after break	BRYANT, Melanie	1	Meet with HOY	In School Incidents	26/01/2019	Head of Year	25/01/2019, BEST, Malcolm	

There are two grids on this screen. The one at the top shows pastoral management records with actions against them that you need to complete. If you are a Pastoral Management Administrator, however, this grid shows a full list of all records with actions against them. To just see records with actions that you need to complete, click **Me**. To switch back to the full list, click **All**.

The screenshot shows the 'Pastoral Management Dashboard' with the 'Requires Action By: All' filter selected. The table displays the same records as the previous screenshot:

Actions	Unread Changes	Pupil Name(s)	Heading	Raised by	No. of open actions	Action Summary	Record Reason(s)	Action by Date	Action by	Last modified by	Follow Up
		CHARLES, Emily BURGESS, Andrew P PHILLIPS, James D	Poor attitude in Chemistry Lessons	BOULDER, Brian James	1	Update class layout.	In School Incidents	17/02/2020	Form Tutor	31/01/2020, STRINGER, Robert	
		ABBOTT, Isabel Francesca	Anxiety Issues	BAKER, Molly B	1	Arrange counselling.	Counselling Issues	04/02/2020	Form Tutor	03/02/2020, STRINGER, Robert	
		BURGESS, Andrew P	Uncharacteristic rudeness and poor behaviour	RANKIN, Katie	2	Review in 2 weeks	In School Incidents	13/03/2019	Form Tutor	27/02/2019, BRYANT, Melanie	
		BURGESS, Amanda J BURGESS, Andrew P	Issues at home	BRYANT, Melanie	1	Follow up Counselling Session	Home Circumstances, Counselling Issues	15/02/2019	Form Tutor	14/02/2019, BRYANT, Melanie	
		BURGESS, Andrew P	Absent from lessons after break	BRYANT, Melanie	1	Meet with HOY	In School Incidents	26/01/2019	Head of Year	25/01/2019, BEST, Malcolm	




If there is a record that you want to highlight, you can mark it for follow up by clicking in the **Follow Up** column. The icon changes colour once selected, i.e. .

The second grid shows a list of recently added pastoral records.

The screenshot shows the 'Recent Pastoral Records' grid with the following records:

Actions	Unread Changes	Pupil Name(s)	Form	Heading	Status	Record Reason(s)	Date	Last modified by
		ABBOTT, Thomas James	Form 5B	Racist Language	Open	In School Incidents	12/02/2020	12/02/2020, STRINGER, Robert
		ABBOTT, Isabel Francesca	Form 8A	Anxiety Issues	Open	Counselling Issues	31/01/2020	03/02/2020, STRINGER, Robert
		ASHFIELD, Gemma Frances FARRELL, Eden BURCHER, Rebecca DAVIS, Callum	Form 11A Form 11A Form 11A Form 11A	Conflict with other pupils	Open	In School Incidents	24/09/2019	11/11/2019, STRINGER, Robert
		DAVIS, Laura	Upper Sixth	Anxiety about Exams	Open	Counselling Issues	08/05/2019	08/05/2019, BREWER, Christine
		ADAMS, Lauren S BURGESS, Andrew P	Upper Sixth Upper Sixth	Alleged Bullying	Open	In School Incidents	10/01/2020	31/01/2020, STRINGER, Robert

Both grids have an **Actions** column. To view a record in more detail, click . To edit the record, click . If you have the relevant permissions, you can click to soft delete a record.

 You can re-order a grid by single-clicking on fields in the header row. If  is displayed, the list is ordered from A to Z / lowest to highest. If  appears, the list is ordered from Z to A / highest to lowest.

At the bottom of the screen, there is a link to the **Pastoral Record Search** screen, where you can filter records by a range of criteria.


ur	20/02/2019	20/02/2019, STRINGER, Robert
		Search More Pastoral Records

For more information, see:

- » ["About Pastoral Management Notes and Actions" on the next page.](#)
- » ["About Adding Pastoral Records" on page 16.](#)
- » ["About Maintaining Pastoral Records" on page 26.](#)
- » ["About Deleting Pastoral Records" on page 42.](#)

About Pastoral Management Notes and Actions


Users with appropriate access can add **Notes** with further information or more recent developments to pastoral management records. In addition, **Actions** can be added and assigned to staff as part of a note.

Actions have an alert system which means any that have not been completed by the specified deadline include .

Notes

Pupil name: Child protection concern form 1: Child protection concern form 2:
 Wellbeing concern form 1: Wellbeing concern form 2:

Sort Descending Sort Ascending

 **Speak with Rebecca**

Action By: 01 July 2016 || STRINGER, Robert (30 June 2016)

Category:

Note: Mary Cavendish has alleged that Rebecca Kerr is being bullied by Rachel Alexander-Guthridge. Please speak with Rebecca to investigate further.

Pupil name(s): KERR, Rebecca

Action Summary: Speak with Rebecca re. Possible Bullying

Action Note:

Action By: STRINGER, Robert

Note Visible to Specific Staff: STRINGER, Robert

GIRFEC forms:

Page Size: 5 10 25 50 100 Records: 1

Action details appear on the **Pastoral Management Dashboard** screen of the relevant staff, providing a convenient, single place where staff can see what they need to do and when they need to have completed the action.

Pastoral / Behaviour Pastoral Management Dashboard

Requires Action By: Me All

Actions	Unread Changes	Pupil Name(s)	Heading	Raised by	No. of open actions	Action Summary	Record Reason(s)	Action by Date	Action by	Last modified by	Follow Up
		CHARLES, Emily BURGESS, Andrew P PHILLIPS, James D	Poor attitude in Chemistry Lessons	BOULDER, Brian James	1	Update class layout.	In School Incidents	17/02/2020	Form Tutor	31/01/2020, STRINGER, Robert	
		ABBOTT, Isabel Francesca	Anxiety Issues	BAKER, Molly B	1	Arrange counselling.	Counselling Issues	04/02/2020	Form Tutor	03/02/2020, STRINGER, Robert	
		BURGESS, Andrew P	Uncharacteristic rudeness and poor behaviour	RANKIN, Katie	2	Review in 2 weeks	In School Incidents	13/03/2019	Form Tutor	27/02/2019, BRYANT, Melanie	
		BURGESS, Amanda J BURGESS, Andrew P	Issues at home	BRYANT, Melanie	1	Follow up Counselling Session	Home Circumstances, Counselling Issues	15/02/2019	Form Tutor	14/02/2019, BRYANT, Melanie	
		BURGESS, Andrew P	Absent from lessons after break	BRYANT, Melanie	1	Meet with HOY	In School Incidents	26/01/2019	Head of Year	25/01/2019, BEST, Malcolm	


5 items per page 1 - 5 of 11 items Page 1 of 3

Recent Pastoral Records

Actions	Unread Changes	Pupil Name(s)	Form	Heading	Status	Record Reason(s)	Date	Last modified by
		ABBOTT, Thomas James	Form 5B	Racist Language	Open	In School Incidents	12/02/2020	12/02/2020, STRINGER, Robert

If there is more than one open action, users can click on the number to see more information in a popup.

Action Summary	Action By Date	Action By
Arrange Library Induction	08/06/2018	SANDERS, Hazel Ruth
Undertake Introductory Tour	08/06/2018	BELL, Alexander



Once an action, e.g. interviewing a pupil, has been completed, it must be marked as such in the software and any relevant information added. A alert appears on a completed task, as shown in the screenshot below.

Absence Arrangements

STRINGER, Robert (22 July 2016)

Category: High Priority


Note: Mr. and Mrs. Davis wish to remove Steven and Laura from school for a few days next week. Arrangements should be made so that this does not impact their studies.


Pupil Name(s): DAVIS, Laura
DAVIS, Steven

Action Summary: Ensure Catch Up Sessions for Steven and Laura Arranged

Action Note: This has been done and all subject areas covered.

Note Visible to Specific Staff: ANDREWS, Ellie J
BINNS, Elise
BRYANT, Melanie
HILTON, John
MULLINS, Melvyn Andrew
ROBINSON, Peter
STRINGER, Robert

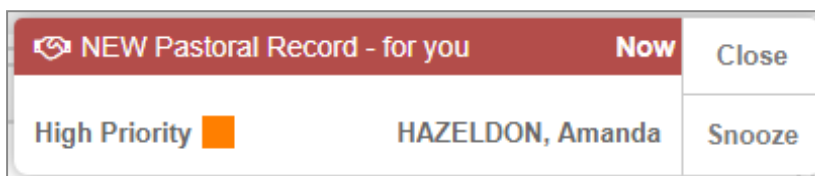
 If actions are incomplete, the related note's status CANNOT be changed to 'Closed'.

 For more information about adding and managing pastoral management notes and actions, see ["Adding Pastoral Record Notes or Actions" on page 22](#) and ["About Maintaining Pastoral Records" on page 26](#).

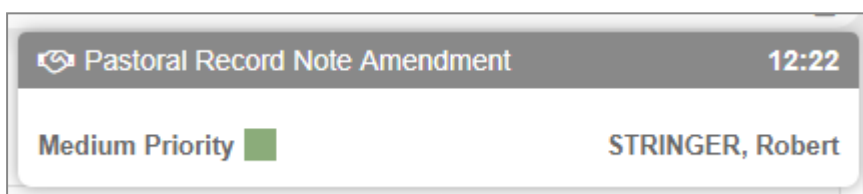
About Pastoral Management Module Notifications

When a pastoral incident is raised or amended, automatic banner alerts and emails can be sent so that those who need to take action can respond quickly. Notifications include:

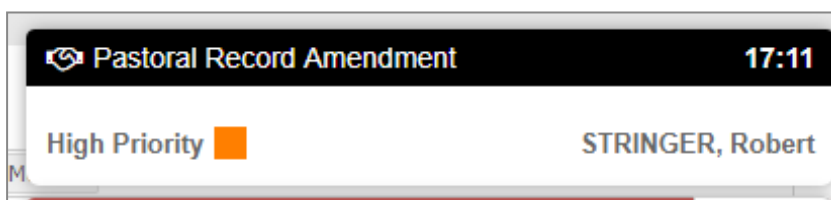
- » **Pastoral Alerts** - These appear to Pastoral Management module users in relation to new records and the actionable notes with which they are associated. They are red and usually require the recipient to take action.




- » **Pastoral Alert Banners** - These notify Pastoral Management module users when colleagues amend or close pastoral records associated with them. Pastoral banner alerts are grey or black and for information only.



- » **Pastoral Administrator Alert Banners** - These appear to Pastoral Management Administrators to inform them of changes made to any record. They are usually black and for information only. Schools can decide to include the pupil's academic house, boarding house or form year on the alert banner.



- » **Pastoral Emails** - These provide Pastoral Management module users with information about new and amended records via email.

 For more information about pastoral notifications, see the *3sysACADEMIC Online Help*.

 System Administrators set how notifications are sent via profile permission settings. For more information, see the *3sysACADEMIC Pastoral Management Setup Guide*.

About GIRFEC

GIRFEC is the national approach in Scotland to improving outcomes and supporting the wellbeing of children and young people by offering the right help at the right time for the right people. 3sysACADEMIC helps Scottish schools fulfil their GIRFEC responsibilities by incorporating the required forms into the Pastoral Management module and ensuring records can be kept accurately while making a suitable document trail available.

3sysACADEMIC allows users in Scottish schools to:

- » Configure access to GIRFEC forms and information.
- » Associate appropriate pastoral management categories with specific GIRFEC forms.
- » Complete GIRFEC forms when adding new pastoral records and notes.
- » Complete GIRFEC forms after the initial record has been created, if required.
- » Update forms at a later date based upon a copy of the latest version, meaning every change creates a new record and previously captured information remains intact.
- » Download a report summarising child protection concerns.

GIRFEC forms **MUST** be completed PER PUPIL (rather than per record), and in accordance with Scottish Council of Independent Schools (SCIS) guidance. Some fields are completed automatically based on data already added to the system. A warning message appears if there are errors, such as missing or incomplete data, giving the user an opportunity to make corrections.

About Configuring GIRFEC

You complete the GIRFEC information as part of adding and maintaining pastoral records. However, GIRFEC functionality needs to be activated on the system and access to the Pastoral Management module and Child Protection Concern report allocated to relevant users by your System Administrator.



For more information, System Administrators should see the *3sysACADEMIC Pastoral Management Setup Guide*, available from the Customer Centre.

GIRFEC options are associated with categories. When a category is created by your System Administrator, he / she can indicate which GIRFEC forms, if any, can be completed for this type of pastoral record. This means that GIRFEC options appear whenever a user selects a relevant category, e.g. when adding a record via the **Add a Pastoral Record** screen or adding a note via the **Edit a Pastoral Record** screen.

In the following examples, GIRFEC forms are associated with the 'Critical' category, so have appeared when 'Critical' is selected from the **Category** drop list.

Add a Pastoral Record

Pastoral Management records are created to record details of any pastoral support provided to a pupil. Pastoral care involves work with pupils who are having problems of an academic, vocational, social, emotional or behavioural nature.

Save **Cancel**

Pupil name(s): ASHFIELD, Gem...
1 Pupil(s)

Record reason(s): Antisocial Behav...
Staff Name: STRINGER, Robert

Date/Time: 24/02/2020 9 : 41

Category: Critical

Show alert against pupil:

Status: Open

Heading:

Overview:

Make this record visible to all staff:

GIRFEC forms: Child protection concern form 1 Wellbeing concern form 1
Child protection concern form 2 Wellbeing concern form 2

Documents: **Browse**
Click 'Browse' to select files for upload or drop files here.

Save **Cancel**

Category: Critical

Heading: Agressive Behaviour

Note: This record has been upgraded to 'Critical' following recent developments.

Pupil name(s): LAWSON, Elizab...
Make this note visible to all staff:

Action required:

GIRFEC forms: Child protection concern form 1 Wellbeing concern form 1
Child protection concern form 2 Wellbeing concern form 2

Documents: **Browse**
Click 'Browse' to select files for upload or drop files here.

Save

For more information, see:

- » ["About Adding Pastoral Records" on page 16.](#)
- » ["About Maintaining Pastoral Records" on page 26.](#)
- » ["About Maintaining GIRFEC Forms" on page 36.](#)
- » ["Accessing the Child Protection Concern Report \(Scottish Schools Only\)" on page 74.](#)

Adding Pastoral Records

This chapter discusses the following:

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Adding Pastoral Record Notes or Actions	22

CHAPTER 2

About Adding Pastoral Records

You can add pastoral records relating to individual or groups of pupils about the same incident or concern using the Pastoral Management module.

After an initial pastoral record has been logged, subsequent developments, decisions and actions can be added to it as **Notes**. This can be done as soon as the initial record is created or at a later time or date, as required.

Pastoral care often requires a range of staff to undertake roles to help and support pupils. The Pastoral Management module helps you manage specific, allocated tasks through **Actions**. Added as part of a note, actions include a summary of the task that must be completed and are assigned to staff with a deadline.

A list of actions that you need to complete appears at the top of the **Pastoral Management Dashboard** screen, providing a convenient, single place where you can see what you need to do. If you are a Pastoral Management Administrator, it can be filtered using the **Requires Action By** settings above the grid to show just the actions for you or all the open actions across the module.

Actions	Unread Changes	Pupil Name(s)	Heading	Raised by	No. of open actions	Action Summary	Record Reason(s)	Action by Date	Action by	Last modified by	Follow Up
		CHARLES, Emily BURGESS, Andrew P PHILLIPS, James D	Poor attitude in Chemistry Lessons	BOULDER, Brian James	1	Update class layout.	In School Incidents	17/02/2020	Form Tutor	31/01/2020, STRINGER, Robert	
		ABBOTT, Isabel Francesca	Anxiety Issues	BAKER, Molly B	1	Arrange counselling.	Counselling Issues	04/02/2020	Form Tutor	03/02/2020, STRINGER, Robert	
		BURGESS, Andrew P	Uncharacteristic rudeness and poor behaviour	RANKIN, Katie	2	Review in 2 weeks	In School Incidents	13/03/2019	Form Tutor	27/02/2019, BRYANT, Melanie	
		BURGESS, Amanda J BURGESS, Andrew P	Issues at home	BRYANT, Melanie	1	Follow up Counselling Session	Home Circumstances, Counselling Issues	15/02/2019	Form Tutor	14/02/2019, BRYANT, Melanie	
		BURGESS, Andrew P	Absent from lessons after break	BRYANT, Melanie	1	Meet with HOY	In School Incidents	26/01/2019	Head of Year	25/01/2019, BEST, Malcolm	

A list of recently added pastoral records that a user can access, whether they have a specific action to complete or not, also appears on their **Pastoral Management Dashboard**.

Actions	Unread Changes	Pupil Name(s)	Form	Heading	Status	Record Reason(s)	Date	Last modified by
		ABBOTT, Thomas James	Form 5B	Racist Language	Open	In School Incidents	12/02/2020	12/02/2020, STRINGER, Robert
		ABBOTT, Isabel Francesca	Form 6A	Anxiety Issues	Open	Counselling Issues	31/01/2020	03/02/2020, STRINGER, Robert
		ASHFIELD, Gemma Frances FARRELL, Eden BURCHER, Rebecca DAVIS, Callum	Form 11A Form 11A Form 11A Form 11A	Conflict with other pupils	Open	In School Incidents	24/09/2019	11/11/2019, STRINGER, Robert
		DAVIS, Laura	Upper Sixth	Anxiety about Exams	Open	Counselling Issues	08/05/2019	08/05/2019, BREWER, Christine
		ADAMS, Lauren S BURGESS, Andrew P	Upper Sixth Upper Sixth	Alleged Bullying	Open	In School Incidents	10/01/2020	31/01/2020, STRINGER, Robert

For more information, see:

- » ["About the Pastoral Management Dashboard" on page 8.](#)
- » ["About Pastoral Management Notes and Actions" on page 10.](#)
- » ["Adding Pastoral Records" on the facing page.](#)
- » ["Adding Pastoral Record Notes or Actions" on page 22.](#)
- » ["About Maintaining Pastoral Records" on page 26.](#)



These procedures incorporate the completion of GIRFEC information. (Applicable for Scottish schools only.) For more information, see ["About GIRFEC" on page 13.](#)

Adding Pastoral Records

HOW TO ADD A PASTORAL RECORD

1. Go to **Pastoral / Behaviour > Pastoral Management > Add Pastoral Record**.

The **Add a Pastoral Record** screen appears.

Add a Pastoral Record

Pastoral Management records are created to record details of any pastoral support provided to a pupil. Pastoral care involves work with pupils who are having problems of an academic, vocational, social, emotional or behavioural nature.

Save Cancel

Pupil name(s): 0 Pupil(s)

Record reason(s):

Staff Name: STRINGER, Robert

Date/Time: 24/02/2020 9 : 51

Category:

Status: Open

Heading:


Overview:


Make this record visible to all staff:


Documents: Browse


Click 'Browse' to select files for upload or drop files here.

Save Cancel

 You **MUST** complete any sections marked with a red bar on the left-hand side.

 When created, each pastoral record's status is automatically set to 'Open'.


2. Complete the **Pupil name(s)** field with details of the relevant pupil(s) using auto complete or the search option, accessed via .

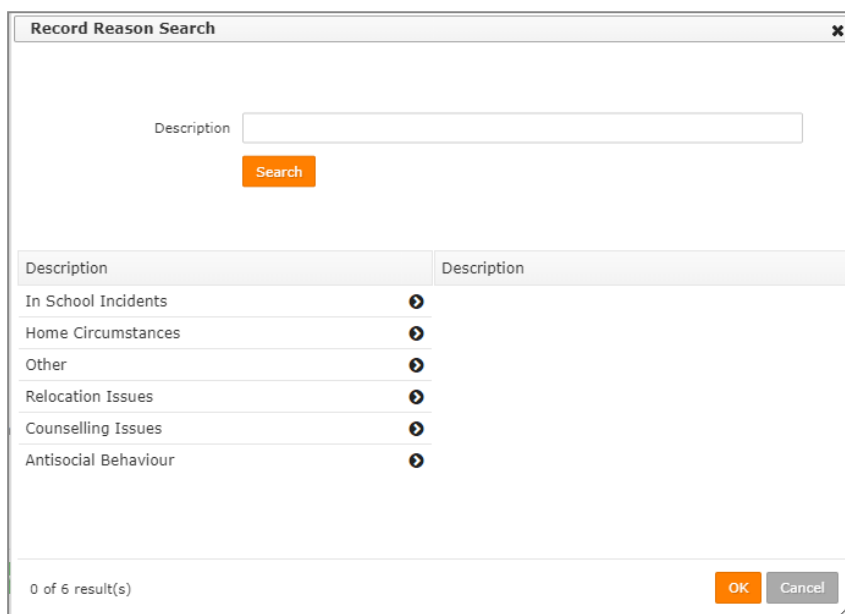
 If you are unsure how to add one or more pupil name(s) to this field, see the *3sysACADEMIC Online Help*.







3. Add one or more options to the **Record reason(s)** field using auto complete or the search option, accessed via .


More details...

To select a reason, do ONE of the following:

- » Click in the **Record reason(s)** field and type the first letters of the reason you require. Select it from the options that appear in the drop list. This is known as auto complete. Repeat this sequence until you have selected all the record reasons you want.
- » Click  and the **Record Reason Search** dialog appears.




Description	Description
In School Incidents	
Home Circumstances	
Other	
Relocation Issues	
Counselling Issues	
Antisocial Behaviour	

- a. Type all or part of the reason you want into the **Description** field OR leave it blank to return a complete list of available options.
 - b. Click **Search**.
 - c. Select the reason you want from the list that appears. The reason moves to the right-hand, selected column.
 - d. (Optional) Repeat this sequence until you have selected all the record reasons that you require.
 - e. Click **OK**.
4. Change the reporting member of staff, if required, using auto complete or the search option, accessed via . (The logged in user appears automatically.)




If you are unsure how to add a staff member's name to this field, see the [3sysACADEMIC Online Help](#).


5. Amend the **Date / Time** fields, if required, by typing in the relevant date and time or using the **Calendar** popup, accessed via . (Today's date and the current time appear automatically.)

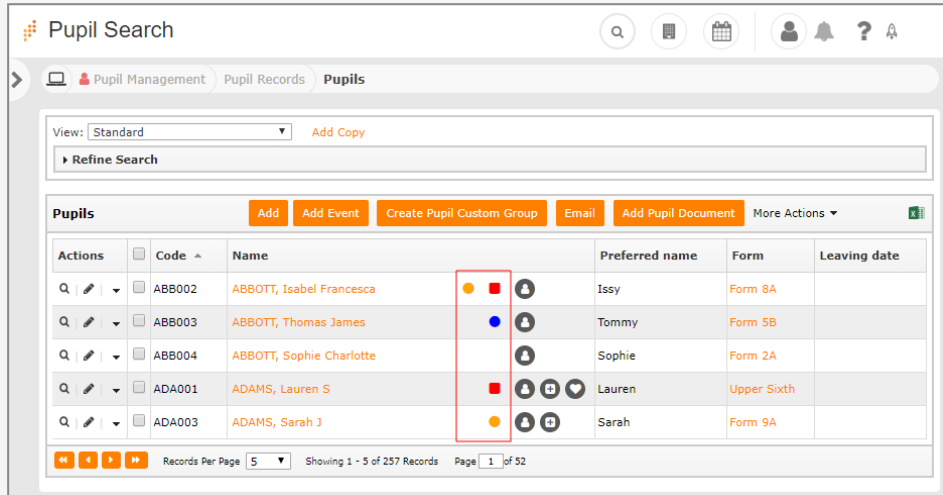


If you are unsure how to add a date to this field, see the [3sysACADEMIC Online Help](#).

6. (Optional) Select an option from the **Category** drop list or use auto complete.

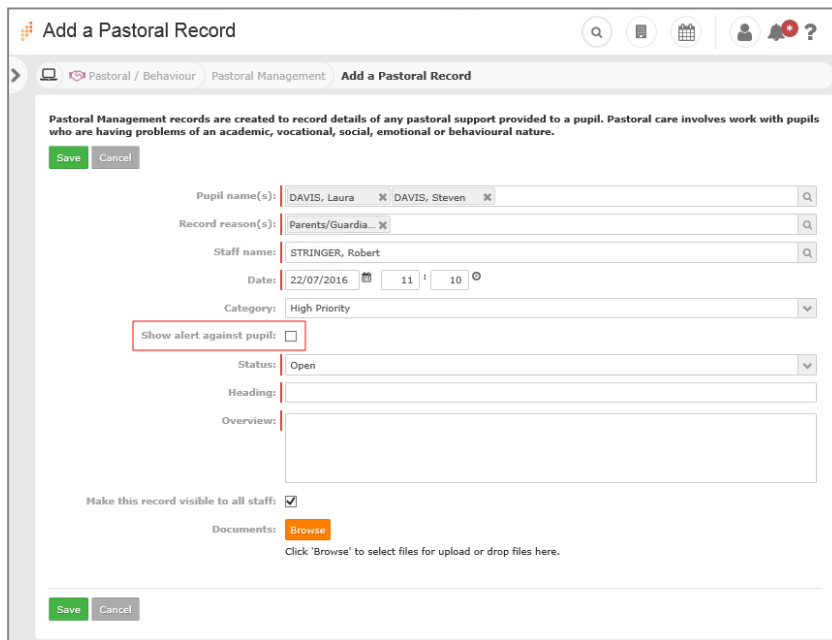
 (Scottish Schools Only) If you select a category with GIRFEC requirements, links to the relevant forms appear.

 If there is an icon associated with your chosen category, the **Show Alert Against Pupil** check box appears. This means that the category's icon appears against the relevant pupil in the **Pupil Search** grid and in pupil-related lists, e.g. academic house.



Actions	Code	Name	Preferred name	Form	Leaving date
	ABB002	ABBOTT, Isabel Francesca	Isy	Form 8A	
	ABB003	ABBOTT, Thomas James	Tommy	Form 5B	
	ABB004	ABBOTT, Sophie Charlotte	Sophie	Form 2A	
	ADA001	ADAMS, Lauren S	Lauren	Upper Sixth	
	ADA003	ADAMS, Sarah J	Sarah	Form 9A	

- (Optional) If the selected category has an icon, tick the **Show alert against pupil** check box to make it appear in the **Pupil Search** and other pupil-relevant grids.



Add a Pastoral Record

Pastoral Management records are created to record details of any pastoral support provided to a pupil. Pastoral care involves work with pupils who are having problems of an academic, vocational, social, emotional or behavioural nature.

Pupil name(s): DAVIS, Laura X DAVIS, Steven X

Record reason(s): Parents/Guardia... X

Staff names: STRINGER, Robert

Date: 22/07/2016 11:10

Category: High Priority

Show alert against pupils


Status: Open

Heading:

Overview:

Make this record visible to all staff:


Documents: Click 'Browse' to select files for upload or drop files here.


 This check box is only available if the selected category has a shape and colour associated with it.


- Type relevant information into the **Heading** and **Overview** fields.


9. To set the record's visibility, do ONE of the following:


- » To make the record visible to all staff with access to pastoral records in this category, tick the **Make this record visible to all staff** check box.

 When you save the record, a **Warning** popup appears if you have selected this option. Read the message and, if you are happy for the record to be visible to all staff with access to this category, click **OK**.


- » To make the record only visible to selected staff with access to pastoral records in this category, add the name(s) or role of relevant staff to the **Make this record visible to specific staff / roles** field using auto complete or the search option, accessed via .

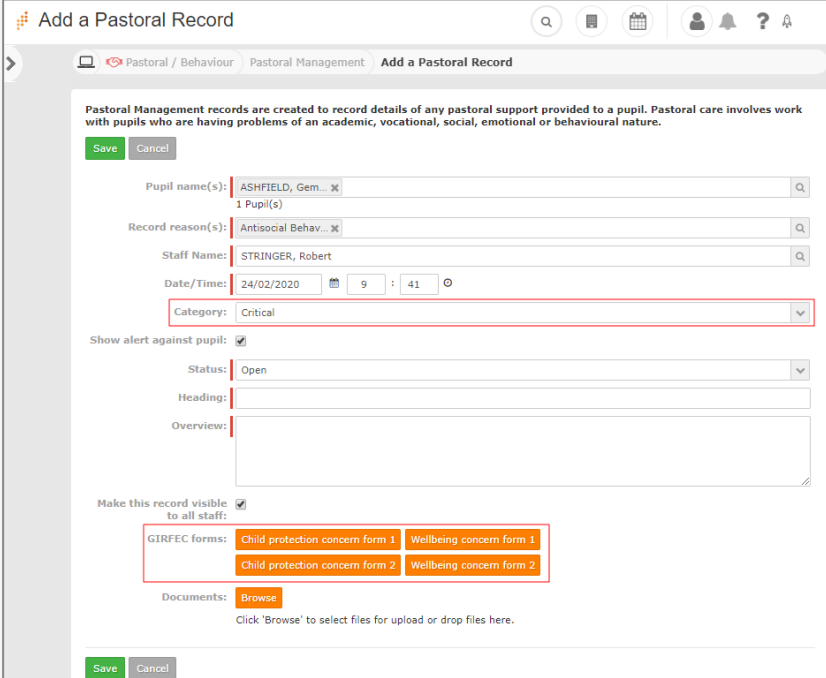
 If required, ensure that the reporting member of staff is included in the list of individuals who can see the record.

 Staff with Pastoral Management module Administrator access can see all pastoral records and notes regardless of whether they are included on the list of those to whom the record / note is visible.

 If you are unsure how to add one or more staff member's name(s) to this field, see the *3sysACADEMIC Online Help*.


10. (Scottish Schools Only) If applicable, click on the relevant GIRFEC form and complete it according to Scottish Council of Independent Schools (SCIS) guidance. Some fields are completed automatically. When finished, click **Save**.

 You **MUST** complete all compulsory fields on the **Add a Pastoral Record** screen before accessing the GIRFEC forms. GIRFEC options only appear if they are linked to the category selected.



The screenshot shows the 'Add a Pastoral Record' form with the following details:

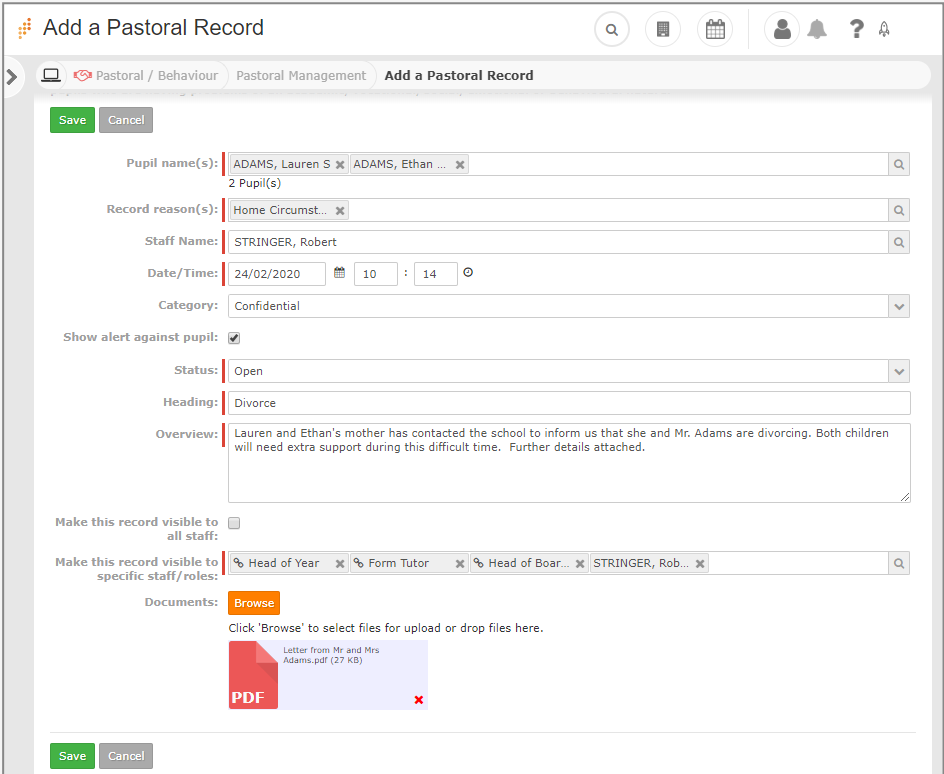
- Pupil name(s):** ASHFIELD, Gem... (1 Pupil(s))
- Record reason(s):** Antisocial Behav...
- Staff Name:** STRINGER, Robert
- Date/Time:** 24/02/2020 9:41
- Category:** Critical
- Show alert against pupil:**
- Status:** Open
- Heading:** (empty)
- Overview:** (empty text area)
- Make this record visible to all staff:**
- GIRFEC forms:**
 - Child protection concern form 1
 - Wellbeing concern form 1
 - Child protection concern form 2
 - Wellbeing concern form 2
- Documents:** Browse

 When saving a GIRFEC form, warning popups appear if the form contains any errors, such as missing data. This gives you the opportunity to correct the form before saving the record.

- (Optional) Attach related documents or evidence, such as statements and photographs, by browsing and selecting files or dragging and dropping from a separate window.

 For more about how to attach files to records, see the *3sysACADEMIC Online Help*.

E.G. This screenshot provides an example of a pastoral record where the parents of two pupils are divorcing.



- Click **Save**.

The relevant **View a Pastoral Record** screen appears, showing the newly created record with a **Notes** section now available at the bottom of the screen.



Notes

Pupil name:

Child protection concern form 1: Child protection concern form 2:

Wellbeing concern form 1: Wellbeing concern form 2:


13. (Optional) Do ONE of the following:

- » Click **Edit**, scroll down and add notes to the record. For more information, see ["Adding Pastoral Record Notes or Actions"](#) below.
- » Click **Edit** to amend the record. For more details, see ["Editing Pastoral Records"](#) on page 30.
- » Click **Delete** to go to the **Delete a Pastoral Record** screen and remove the record from the system. For more information, see ["About Deleting Pastoral Records"](#) on page 42.
- » Click  to generate an audit file for the record. For details, see ["About Maintaining Pastoral Records"](#) on page 26.
- » Click  to open a **Print** dialog. Select a printer and click **Print** to print the record.

Adding Pastoral Record Notes or Actions


HOW TO ADD A PASTORAL RECORD NOTE OR ACTION

1. Find the pastoral record which requires a note.

 If you are unsure how to find a record, see step 1 of ["Viewing Pastoral Records"](#) on page 26.

2. Click  next to the relevant record.

The related **Edit a Pastoral Record** screen appears.

 The **Edit a Pastoral Record** screen also appears when a record is first created, meaning you can also add notes immediately, if required.

3. Click **Add** in the **Notes** section.

Notes

Pupil name:

Child protection concern form 1: Wellbeing concern form 1:

Child protection concern form 2: Wellbeing concern form 2:

Further fields appear.

Category:

Heading:

Note:

Pupil name(s):


Make this note visible to all staff:

Make this note visible to specific staff/roles:


Action required:

Documents:

Click 'Browse' to select files for upload or drop files here.


 You **MUST** complete any fields marked with a red bar on the left-hand side.


4. Select an option using the **Category** drop list.


 (Scottish Schools Only) If you select a category with GIRFEC requirements, links to the relevant forms appear.

5. Type a heading for the note in the **Heading** field and more information in the **Note** field.
6. (Optional) Remove unrelated pupils from the **Pupil name(s)** field, if required, e.g. if several pupils were involved in an incident, but the note only applies to some of them.
7. To set the note's visibility, do ONE of the following:

- » To make the note visible to all staff who have access to this pastoral record, tick the **Make this note visible to all staff** check box.

 When you save the record, a **Warning** popup appears if you have selected this option. Read the message and, if you are happy for the record to be visible to all staff with access to this record, click **OK**.

- » To make the note only visible to selected staff with access to this pastoral record, add the name(s) or role of relevant staff to the **Make this note visible to specific staff / roles** field using auto complete or the search option, accessed via .


 If you are unsure how to add one or more staff member's name(s) to this field, see the *3sysACADEMIC Online Help*.



8. (Optional) If further or follow up action is required, such as contacting parents / guardians, interviewing pupils or liaising with the authorities, do the following:

- a. Tick the **Action required** check box.


Additional fields appear.



- b. Complete the **Action by date** field by typing in the relevant date and time or using the **Calendar and Time** popup, accessed via .


 If an action is overdue,  appears next to the note's heading in the pastoral record.

- c. Add who should complete the action in the **Action by** field. (You can add specific names or roles.)


 Staff assigned actions **MUST** have been given access to 3sysACADEMIC by your System Administrator.

9. (Scottish Schools Only) If applicable, click on the relevant GIRFEC form and complete it according to Scottish Council of Independent Schools (SCIS) guidance. Some fields are completed automatically. When finished, click **Save**.

 For more information, see "[About GIRFEC](#)" on page 13.

 When saving a GIRFEC form, warning popups appear if the form contains any errors, such as missing data. This gives you the opportunity to correct the form before saving the record.

- (Optional) Attach related documents, such as reports, statements or correspondence, by browsing and selecting files or dragging and dropping from a separate window.

 For more about how to attach files to records, see the *3sysACADEMIC Online Help*.

- Click **Save**.

Category: High Priority

Heading: Absence Arrangements

Note: Mr. and Mrs. Davis wish to remove Steven and Laura from school for a few days next week. Arrangements should be made so that this does not impact their studies.

Pupil name(s): DAVIS, Steven x DAVIS, Laura x

Make this note visible to all staff:

Make this note visible to specific staff / roles: ANDREWS, Ellie J x BINNS, Elise x BRYANT, Melanie x HILTON, John x
MULLINS, Melvy... x ROBINSON, Peter x STRINGER, Rob... x

Action required:

Action summary: Ensure Catch Up Sessions for Steven and Laura Arranged


Action by date: 02/01/2018 11:47

Action by: STRINGER, Rob... x


Documents: [Browse](#)

Click 'Browse' to select files for upload or drop files here.

[Save](#)

 If you have added staff to the note who do NOT already have access to the associated pastoral record, a popup message appears. Click **OK** to give the additional users access to the main pastoral record too.

Message from webpage x

 The staff below needs visibility over the pastoral Record. They will be added to this pastoral Record. Are you sure you wish to proceed?

BAKER, Molly B
WRIGHT, Diana

OK
Cancel

CHAPTER 3

Maintaining Pastoral Records

This chapter discusses the following:

About Maintaining Pastoral Records	26
Viewing Pastoral Records	26
Viewing Pastoral Record Notes	29
Editing Pastoral Records	30
Editing Pastoral Record Notes	31
Marking Pastoral Record Actions 'Complete'	33

About Maintaining Pastoral Records

The Pastoral Management module can be used to view, delete and make amendments and additions to pastoral records. This includes being able to add and amend pastoral record notes and actions and mark actions 'complete'.

For details see:

- » "Viewing Pastoral Records" below.
- » "Viewing Pastoral Record Notes" on page 29.
- » "Editing Pastoral Records" on page 30.
- » "Editing Pastoral Record Notes" on page 31.
- » "Marking Pastoral Record Actions 'Complete'" on page 33.



The options you see depend upon the permissions set by your System Administrator.

Staff access to pastoral records can be limited to protect pupil confidentiality. Records are normally available to the person who created them, staff linked to the record's category and Pastoral Management Administrators.



For more information about categories, see *3sysACADEMIC Online Help* or the *3sysACADEMIC Pastoral Management Setup Guide*.

Viewing Pastoral Records

HOW TO VIEW A PASTORAL RECORD

- Find the pastoral record that you would like to view via the **Pastoral Management Dashboard** OR the **Pastoral Record Search** screen:

- » The **Pastoral Management Dashboard**.

More details...

- Go to **Pastoral / Behaviour > Pastoral Management > Dashboard**.

Your **Pastoral Management Dashboard** screen appears, listing actions you are due to complete and recently added records that you can access.

Requires Action By: Me All	Unread	Changes	Pupil Name(s)	Heading	Raised by	No. of open actions	Action Summary	Record Reason(s)	Action by Date	Action by	Last modified by	Follow up
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	CHARLES, Emily BURGESS, Andrew P PHILLIPS, James D	Poor attitude in Chemistry lessons	BOLLIER, Brian James	1	Update class layout.	In School Incidents	17/02/2020	% Form Tutor	21/01/2020, STRONGER, Robert	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	ABBOTT, Isabel Francesca	Anxiety Issues	BAKER, Holly B	1	Arrange counselling.	Counselling Issues	04/02/2020	% Form Tutor	03/01/2020, STRONGER, Robert	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	BURGESS, Andrew P	Uncharacteristic rudeness and poor behaviour	RANKIN, Katie	2	Review in 2 weeks	In-School Incidents	13/02/2019	% Form Tutor	27/02/2019, BRYANT, Melanie	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	BURGESS, Amanda J BURGESS, Andrew P	Issues at home	BRYANT, Melanie	1	Follow up Counselling Session	Home Circumstances, Counselling Issues	15/02/2019	% Form Tutor	14/02/2019, BRYANT, Melanie	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	BURGESS, Andrew P	Absent from lessons after break	BRYANT, Melanie	1	Meet with HOY	In-School Incidents	24/01/2019	% Head of Year	25/01/2019, BERT, Malcolm	<input type="checkbox"/>

Recent Pastoral Records	Unread	Changes	Pupil Name(s)	Form	Heading	Status	Record Reason(s)	Date	Last modified by
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	ABBOTT, Thomas James	Form 5B	Racist Language	Open	In School Incidents	12/02/2020	12/02/2020, STRONGER, Robert
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	ABBOTT, Isabel Francesca	Form 5A	Anxiety Issues	Open	Counselling Issues	21/01/2020	03/02/2020, STRONGER, Robert
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	ASHFIELD, Gemma Frances HARRIS, Ewan BURGESS, Rebecca DAVIS, Cathryn	Form 11A Form 11A Form 11A Form 11A	Conflict with other pupils	Open	In School Incidents	24/09/2019	11/11/2019, STRONGER, Robert
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	DAVIS, Lewis	Upper Sixth	Anxiety about Exams	Open	Counselling Issues	08/09/2019	08/09/2019, BREWER, Christine
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	ADAMS, Lauren S BURGESS, Andrew P	Upper Sixth Upper Sixth	Alleged Bullying	Open	In School Incidents	10/01/2020	31/01/2020, STRONGER, Robert

- (Optional) Use the **Page** icons beneath a grid to navigate between pages of records.

» The **Pastoral Record Search** screen.


More details...

- a. Do ONE of the following:
 - » Go to **Pastoral / Behaviour > Pastoral Management > Search**.
 - » Go to **Pastoral / Behaviour > Pastoral Management > Dashboard** and click **Search More Pastoral Records** in the bottom right-hand corner of the **Pastoral Management Dashboard** screen.


The **Pastoral Record Search** screen appears.

Actions	Unread Changes	Pupil name(s)	Form	Reason(s)	Heading	Raised by	Status	Action required	Date	Last modified by
		ABBOTT, Thomas James	Form 5B	In School Incidents	Racist Language	STRINGER, Robert	Open	<input type="checkbox"/>	12/02/2020	12/02/2020, STRINGER, Robert
		ABBOTT, Isabel Francesca	Form 8A	Counselling Issues	Anxiety Issues	BAKER, Molly B	Open	<input checked="" type="checkbox"/>	31/01/2020	03/02/2020, STRINGER, Robert
		ASHFIELD, Gemma Frances FARRELL, Eden BURCHER, Rebecca DAVIS, Callum	Form 11A Form 11A Form 11A Form 11A	In School Incidents	Conflict with other pupils	BRYANT, Melanie	Open	<input checked="" type="checkbox"/>	24/09/2019	11/11/2019, STRINGER, Robert


- b. Enter your search criteria in one or more of the fields at the top of the screen OR select a saved search using the **Search** drop list.

 To begin a completely new search, click **Clear**. To search on more than one criterion, complete multiple fields before clicking **Search** OR do successive searches WITHOUT clicking **Clear**. This means you gradually narrow down the list of results.

- c. (Optional) To save the search criteria and re-run the same search in the future, click **Save**, enter a name for the search in the popup that appears and click **Yes**.

 To re-use a saved search, select it using the **Search** drop list.



- d. Click **Search**. Your results populate the grid.

- Click  next to the record you would like to see in more detail.
The relevant **View a Pastoral Record** screen appears.

The screenshot shows the 'View a Pastoral Record' interface. At the top, there are navigation tabs: 'Pastoral / Behaviour', 'Pastoral Management', 'Pastoral Record Search', and 'View a Pastoral Record'. Below the tabs, there are 'Edit' and 'Delete' buttons. The form contains the following fields:

- Pupil name(s): ABBOTT, Isabel ...
- Record reason(s): Counselling Issu...
- Staff Name: BAKER, Molly B
- Date/Time: 31/01/2020 15:29
- Category: Confidential
- Show alert against pupil:
- Status: Open
- Heading: Anxiety Issues
- Overview: Izzy has stated that she's feeling extremely anxious about her forthcoming exams.
- Record visible to all staff:
- Record visible to specific staff: Form Tutor Head of Boar... Head of Year STRINGER, Rob...
- GIRFEC forms:
- Documents:


At the bottom of the form, there are 'Edit' and 'Delete' buttons.


- (Optional) Do ONE of the following:
 - » Click **Edit** to amend the record. For more details, see ["Editing Pastoral Records" on page 30](#).
 - » Click **Delete** to go to the **Delete a Pastoral Record** screen and remove the record from the system.
 - » Click  to generate an audit file for the record. For details, see ["About Pastoral Record Reporting and Auditing" on page 72](#).
 - » Click  to open a **Print** dialog. Select a printer and click **Print** to print the record.

Viewing Pastoral Record Notes

HOW TO VIEW A PASTORAL RECORD NOTE


1. Find the record to which the note is attached via either the **Pastoral Management Dashboard** OR the **Pastoral Record Search** screen.

 If you are unsure how to find a record, see step 1 of "[Viewing Pastoral Records](#)" on page 26.


2. Click  next to the relevant record.
The appropriate **View a Pastoral Record** screen appears.
3. Find the note you would like to view.


More details...

- a. Scroll down the screen to the **Notes** section.

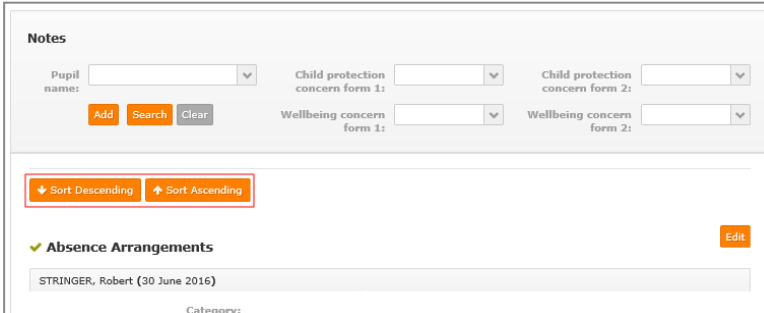


- b. Enter your search criteria in one or more of the fields. You can search by:



Field	Action
Pupil name	Type all or part of the pupil's name into this field OR click  to select from the drop list. Click on your choice in the list that appears.
Child protection concern form 1 / Child protection concern form 2 / Wellbeing concern form 1 / Wellbeing concern form 2	(Scottish Schools Only) Use a drop list to select a GIRFEC form to search by.

 **To begin a completely new search, click **Clear**. To search on more than one criteria, complete multiple fields before clicking **Search** OR do successive searches WITHOUT clicking **Clear**. This means you gradually narrow down the list of results.**

- c. Click **Search**. The results appear in full below the **Notes** section.
- d. (Optional) Click **Sort Ascending** or **Sort Descending** to list the notes chronologically in either ascending or descending order.




4. Do ONE of the following:


- » Click **Clear** to remove the current search criteria and undertake a new search.
- » Click **Edit** to amend the record. For more details, see "[Editing Pastoral Records](#)" below or "[Editing Pastoral Record Notes](#)" on the facing page.
- » Click **Delete** to go to the **Delete a Pastoral Record** screen and remove the record from the system.
- » Click  to generate an audit file for the record. For details, see "[About Pastoral Record Reporting and Auditing](#)" on page 72.
- » Click  to open a **Print** dialog. Select a printer and click **Print** to print the record.

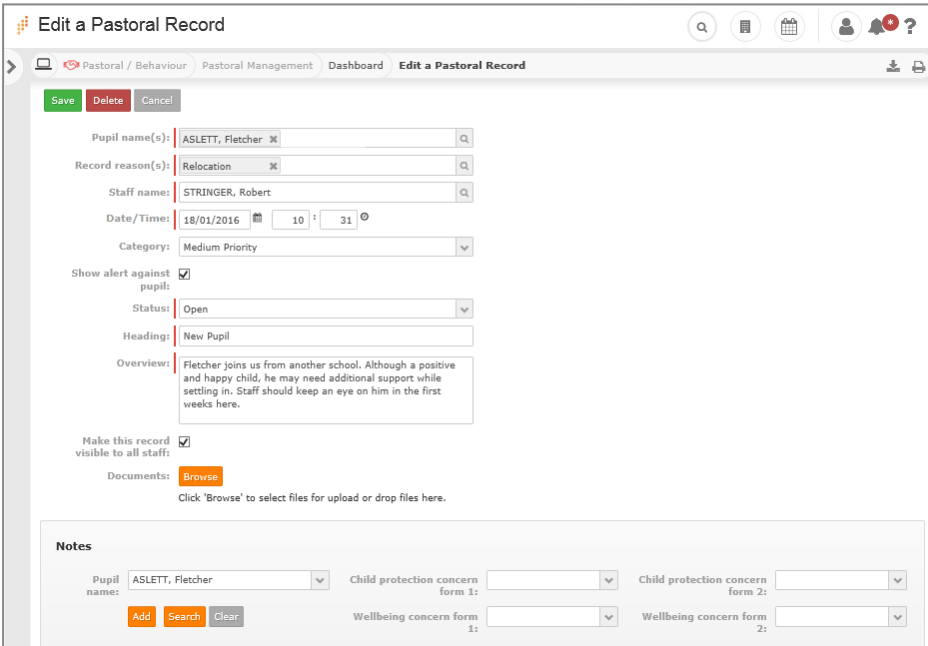
Editing Pastoral Records

HOW TO EDIT A PASTORAL RECORD

1. Find the pastoral record that you would like to edit via the **Pastoral Management Dashboard** OR the **Pastoral Record Search** screen.

 If you are unsure how to find a record, see step 1 of "[Viewing Pastoral Records](#)" on page 26.

2. Click  next to the record you would like to edit.
The relevant **Edit a Pastoral Record** screen appears.



Edit a Pastoral Record

Save Delete Cancel

Pupil name(s): ASLETT, Fletcher

Record reason(s): Relocation

Staff name: STRINGER, Robert

Date/Times: 18/01/2016 10:31

Category: Medium Priority

Show alert against pupil:

Status: Open

Heading: New Pupil

Overview: Fletcher joins us from another school. Although a positive and happy child, he may need additional support while settling in. Staff should keep an eye on him in the first weeks here.

Make this record visible to all staff:

Documents: [Browse](#)
Click 'Browse' to select files for upload or drop files here.

Notes

Pupil name: ASLETT, Fletcher

Child protection concern form 1: [Dropdown]

Child protection concern form 2: [Dropdown]

Wellbeing concern form 1: [Dropdown]

Wellbeing concern form 2: [Dropdown]


Add Search Clear


3. Make your changes, as required.
4. (Optional) Edit the pastoral record's note(s), if required. For details, see "[Editing Pastoral Record Notes](#)" on the facing page.
5. Click **Save**.

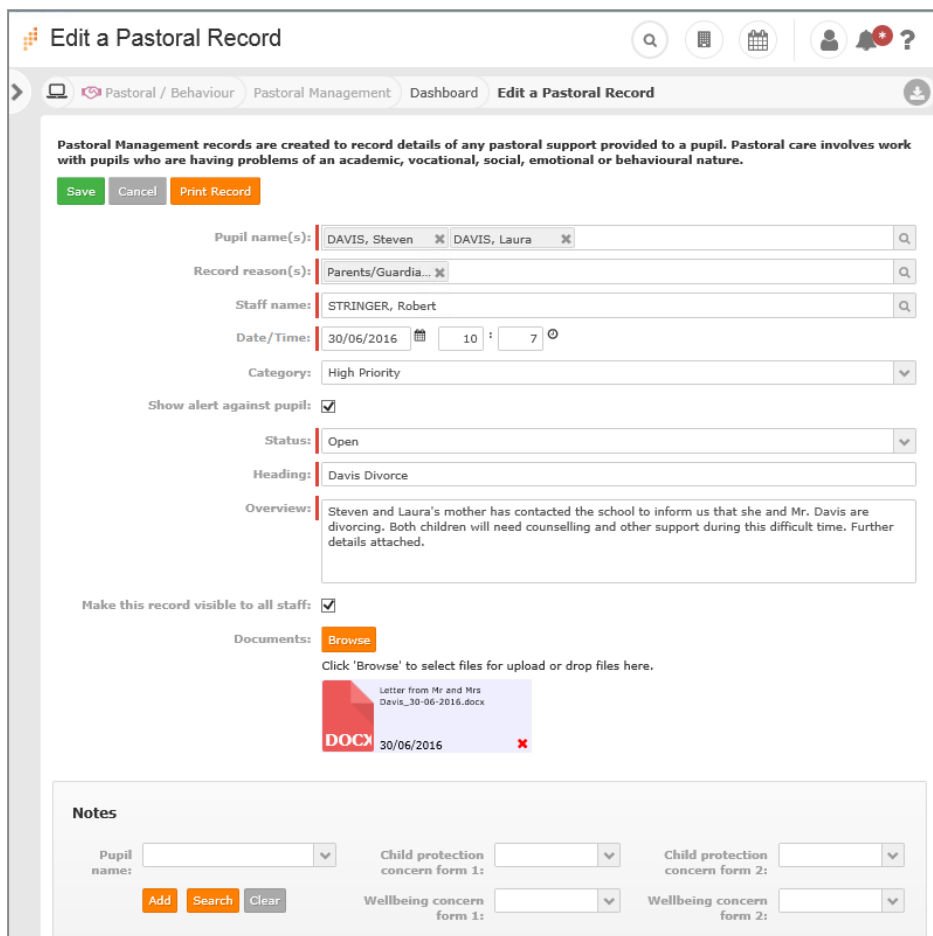
Editing Pastoral Record Notes

HOW TO EDIT A PASTORAL RECORD NOTE

1. Find the pastoral record to which the note is attached via the **Pastoral Management Dashboard** OR the **Pastoral Record Search** screen.

 If you are unsure how to find a record, see step 1 of "[Viewing Pastoral Records](#)" on page 26.

2. Click  next to the relevant record.
The appropriate **Edit a Pastoral Record** screen appears.



Edit a Pastoral Record

Pastoral Management records are created to record details of any pastoral support provided to a pupil. Pastoral care involves work with pupils who are having problems of an academic, vocational, social, emotional or behavioural nature.

Save Cancel Print Record

Pupil name(s): DAVIS, Steven X DAVIS, Laura X

Record reason(s): Parents/Guardia... X

Staff name: STRINGER, Robert

Date/Time: 30/06/2016 10 : 7

Category: High Priority

Show alert against pupil:

Status: Open

Heading: Davis Divorce

Overview: Steven and Laura's mother has contacted the school to inform us that she and Mr. Davis are divorcing. Both children will need counselling and other support during this difficult time. Further details attached.

Make this record visible to all staff:

Documents: Browse

Click 'Browse' to select files for upload or drop files here.

Letter from Mr and Mrs Davis_30-06-2016.docx
DOC 30/06/2016 X

Notes

Pupil name:

Child protection concern form 1:

Child protection concern form 2:

Wellbeing concern form 1:

Wellbeing concern form 2:

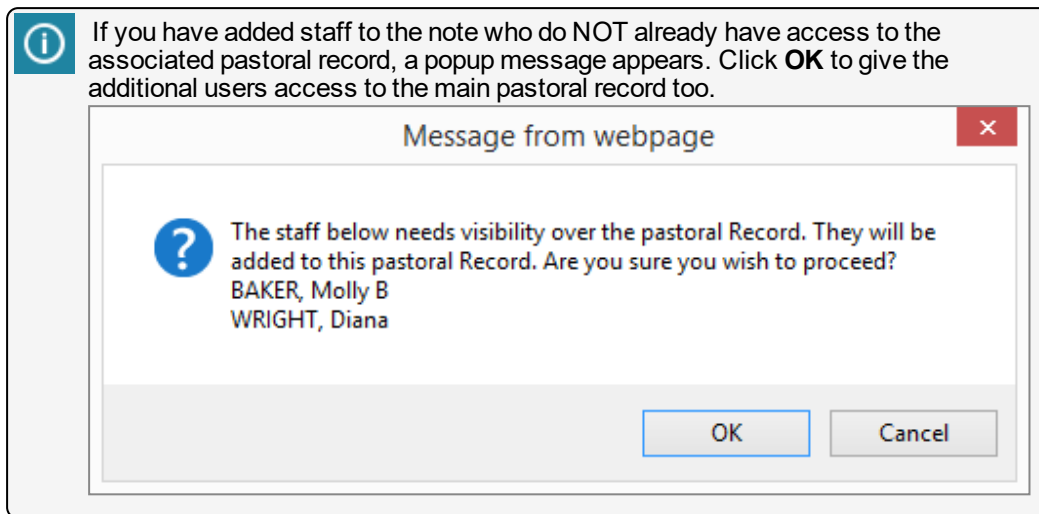
Add Search Clear

3. Find the note you would like to amend.

 If you are unsure how to find a pastoral record note, see step 3 of "[Viewing Pastoral Record Notes](#)" on page 29.

4. Click **Edit** next to the heading of the note you would like to amend.
5. Make your changes, as required.


6. Click **Save**.




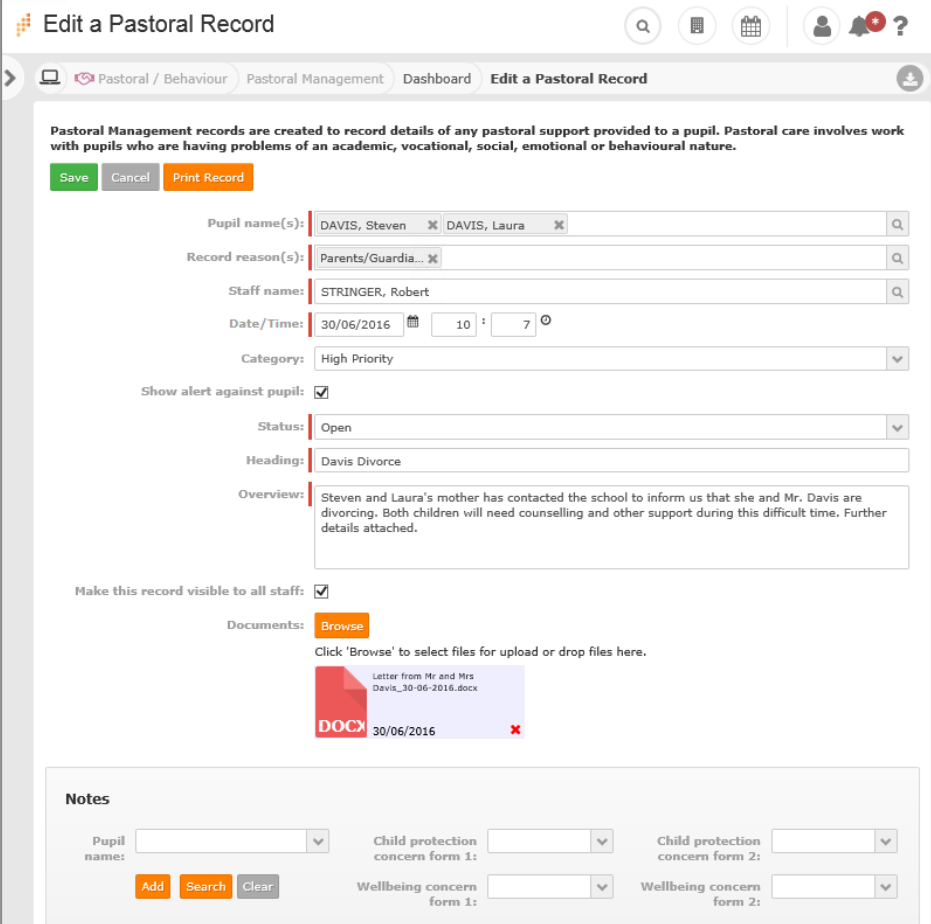
Marking Pastoral Record Actions 'Complete'

HOW TO MARK A PASTORAL RECORD ACTION 'COMPLETE'

1. Access the record to which the action / note is attached via the **Pastoral Management Dashboard** OR the **Pastoral Record Search** screen.

 If you are unsure how to find a record, see step 1 of "[Viewing Pastoral Records](#)" on page 26.

2. Click  next to the relevant record.
The **Edit a Pastoral Record** screen appears.



Edit a Pastoral Record

Pastoral Management records are created to record details of any pastoral support provided to a pupil. Pastoral care involves work with pupils who are having problems of an academic, vocational, social, emotional or behavioural nature.

Save Cancel Print Record

Pupil name(s): DAVIS, Steven X DAVIS, Laura X

Record reason(s): Parents/Guardia... X

Staff name: STRINGER, Robert

Date/Time: 30/06/2016 10 : 7

Category: High Priority

Show alert against pupil:

Status: Open

Heading: Davis Divorce

Overview: Steven and Laura's mother has contacted the school to inform us that she and Mr. Davis are divorcing. Both children will need counselling and other support during this difficult time. Further details attached.

Make this record visible to all staff:

Documents: Browse

Click 'Browse' to select files for upload or drop files here.

Letter from Mr and Mrs Davis_30-06-2016.docx
DOC 30/06/2016 X

Notes

Pupil name:

Child protection concern form 1:

Child protection concern form 2:

Wellbeing concern form 1:

Wellbeing concern form 2:

Add Search Clear

3. Find the note to which the action relates.

 If you are unsure how to find a pastoral record note, see step 3 of "[Viewing Pastoral Record Notes](#)" on page 29.

4. Alongside the relevant note's header, click **Mark as Complete** in the top, right-hand corner.

Edit Mark as Complete

Absence Arrangements

Action By: 30 June 2016 || STRINGER, Robert (30 June 2016)

Category: High Priority

Note: Mr and Mrs Davis wish to remove Steven and Laura from school for a few days next week. Arrangements should be made so that this does not impact their studies.

Pupil name(s): DAVIS, Laura
DAVIS, Steven

Action Summary: Ensure Catch Up Sessions for Steven and Laura Arranged

Action Note: This has been done and all subject areas covered.

Action By: STRINGER, Robert

Note Visible to Specific Staff: ANDREWS, Ellie J
BINNS, Elise
BRYANT, Melanie

The **Mark as Complete** dialog appears.

Mark as Complete ✕

Do you wish to amend the Action Notes before you complete this Action?

Yes No

5. Add a note in the empty field and click **Yes**.

The record is updated and appears next to the note's heading.

Absence Arrangements

STRINGER, Robert (22 July 2016)

Category: High Priority

Note: Mr. and Mrs. Davis wish to remove Steven and Laura from school for a few days next week. Arrangements should be made so that this does not impact their studies.

Pupil Name(s): DAVIS, Laura
DAVIS, Steven

Action Summary: Ensure Catch Up Sessions for Steven and Laura Arranged

Action Note: This has been done and all subject areas covered.

Note Visible to Specific Staff: ANDREWS, Ellie J
BINNS, Elise
BRYANT, Melanie
HILTON, John
MULLINS, Melvyn Andrew
ROBINSON, Peter
STRINGER, Robert

Maintaining GIRFEC Forms

This chapter discusses the following:

About Maintaining GIRFEC Forms	36
Editing, Viewing and Printing GIRFEC Forms (Scottish Schools Only)	36

CHAPTER 4

About Maintaining GIRFEC Forms

GIRFEC forms can be edited, viewed and printed by staff at Scottish schools with the required permission settings.



For more information about GIRFEC tools in the Pastoral Management module, see "About GIRFEC" on page 13.

Editing, Viewing and Printing GIRFEC Forms (Scottish Schools Only)

HOW TO EDIT, VIEW OR PRINT A GIRFEC FORM (SCOTTISH SCHOOLS ONLY)

1. Find the pastoral record to which the GIRFEC form is attached via the **Pastoral Management Dashboard** OR the **Pastoral Record Search** screen.

» The **Pastoral Management Dashboard**.

More details...

- a. Go to **Pastoral / Behaviour > Pastoral Management > Dashboard**.

Your **Pastoral Management Dashboard** screen appears, listing actions you are due to complete and recently added records that you can access.

The screenshot shows the 'Pastoral Management Dashboard' interface. It features a search bar at the top, navigation tabs for 'Pastoral / Behaviour' and 'Pastoral Management', and a 'Dashboard' view. The main content area is divided into two sections: 'Requires Action By: Me' and 'Recent Pastoral Records'.

Requires Action By: Me

Actions	Unread	Changes	Pupil Name(s)	Heading	Raised by	No. of open actions	Action Summary	Record Reason(s)	Action by Date	Action by	Last modified by	Follow up
			CHARLES, Emily BURGESS, Andrew HOLLIS, James	Poor attitude in Chemistry Lessons	SOLLER, Brian James	1	Update class layout.	In School Incidents	17/02/2020	% Form Tutor	21/01/2020, STRONGER, Robert	
			ABBOTT, Isabel Francesca	Anxiety Issues	BAKER, Holly B	1	Arrange counselling.	Counselling Issues	04/02/2020	% Form Tutor	03/02/2020, STRONGER, Robert	
			BURGESS, Andrew	Uncharacteristic rudeness and poor behaviour	HASKIN, Katie	2	Review in 2 weeks	In School Incidents	13/02/2019	% Form Tutor	27/02/2019, BRYANT, Melanie	
			BURGESS, Amanda J BURGESS, Andrew	Issue at home	BRYANT, Melanie	1	Follow up Counselling Session	Home Circumstances, Counselling Issues	12/02/2019	% Form Tutor	14/02/2019, BRYANT, Melanie	
			BURGESS, Andrew	Absent from lessons after break	BRYANT, Melanie	1	Meet with HOY	In School Incidents	24/01/2019	% Head of Year	25/01/2019, BERT, Malcolm	

Recent Pastoral Records

Actions	Unread	Changes	Pupil Name(s)	Form	Heading	Status	Record Reason(s)	Date	Last modified by
			ABBOTT, Thomas James	Form 5B	Racist Language	Open	In School Incidents	12/02/2020	12/02/2020, STRONGER, Robert
			ABBOTT, Isabel Francesca	Form 5A	Acquaint Issues	Open	Counselling Issues	21/01/2020	03/02/2020, STRONGER, Robert
			KIRKFIELD, Gemma Frances HARRIS, Eben BURCHER, Rebecca DAVIS, Calum	Form 11A Form 11A Form 11A Form 11A	Conflict with other pupils	Open	In School Incidents	24/09/2019	11/11/2019, STRONGER, Robert
			DAVIS, Laura	Upper Sixth	Anxiety about Exams	Open	Counselling Issues	08/09/2019	08/09/2019, BREWSTER, Christine
			ADAMS, Lauren D BURGESS, Andrew	Upper Sixth Upper Sixth	Alleged Bullying	Open	In School Incidents	10/01/2020	21/01/2020, STRONGER, Robert

- b. (Optional) Use the **Page** icons beneath a grid to navigate between pages of records.

» The **Pastoral Record Search** screen.

More details...

- a. Do ONE of the following:
 - » Go to **Pastoral / Behaviour > Pastoral Management > Search**.
 - » Go to **Pastoral / Behaviour > Pastoral Management > Dashboard** and click **Search More Pastoral Records** in the bottom right-hand corner of the **Pastoral Management Dashboard** screen.

The **Pastoral Record Search** screen appears.

The screenshot shows the 'Pastoral Record Search' interface. At the top, there are navigation tabs for 'Pastoral / Behaviour', 'Pastoral Management', and 'Pastoral Record Search'. The search area includes fields for 'Search', 'The Camelot School', 'Academic Year 2019 - 2020', and 'Supervisor'. Below these are several filter fields: 'Pupil name(s)', 'Form', 'Reason(s)', 'Heading', 'Raised by', 'Status', 'Year Group', 'Group Tutor', 'Section', 'Action required', 'Action required by staff', 'Action required by date', and 'Date'. There are also buttons for 'Search', 'Clear', 'Save', and 'Delete'. Below the search area is a table with the following columns: 'Actions', 'Unread Changes', 'Pupil name(s)', 'Form', 'Reason(s)', 'Heading', 'Raised by', 'Status', 'Action required', 'Date', and 'Last modified by'. The table contains three rows of data.

Actions	Unread Changes	Pupil name(s)	Form	Reason(s)	Heading	Raised by	Status	Action required	Date	Last modified by
		ABBOTT, Thomas James	Form 5B	In School Incidents	Racist Language	STRINGER, Robert	Open	<input type="checkbox"/>	12/02/2020	12/02/2020, STRINGER, Robert
		ABBOTT, Isabel Francesca	Form 8A	Counselling Issues	Anxiety Issues	BAKER, Molly B	Open	<input checked="" type="checkbox"/>	31/01/2020	03/02/2020, STRINGER, Robert
		ASHFIELD, Gemma Frances FARRELL, Eden BURCHER, Rebecca DAVIS, Callum	Form 11A Form 11A Form 11A Form 11A	In School Incidents	Conflict with other pupils	BRYANT, Melanie	Open	<input checked="" type="checkbox"/>	24/09/2019	11/11/2019, STRINGER, Robert


- b. Enter your search criteria in one or more of the fields at the top of the screen OR select a saved search using the **Search** drop list.

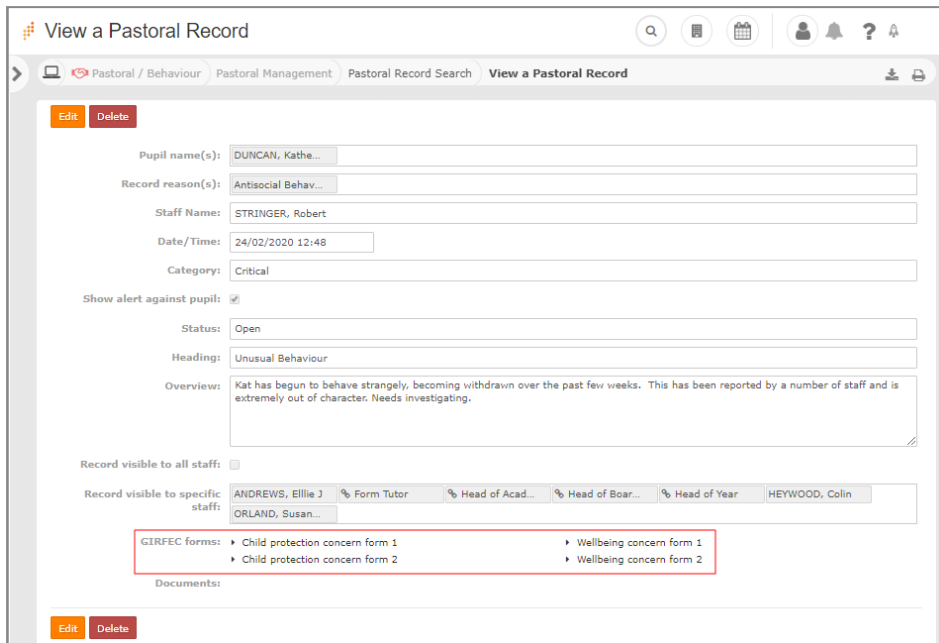
TIP To begin a completely new search, click **Clear**. To search on more than one criterion, complete multiple fields before clicking **Search** OR do successive searches WITHOUT clicking **Clear**. This means you gradually narrow down the list of results.

- c. (Optional) To save the search criteria and re-run the same search in the future, click **Save**, enter a name for the search in the popup that appears and click **Yes**.

INFO To re-use a saved search, select it using the **Search** drop list.

- d. Click **Search**. Your results populate the grid.

- Click  next to the relevant record. The required **View a Pastoral Record** screen appears.



View a Pastoral Record

Pupil name(s): DUNCAN, Kathe...

Record reason(s): Antisocial Behav...

Staff Name: STRINGER, Robert

Date/Time: 24/02/2020 12:48

Category: Critical

Show alert against pupil:

Status: Open

Heading: Unusual Behaviour

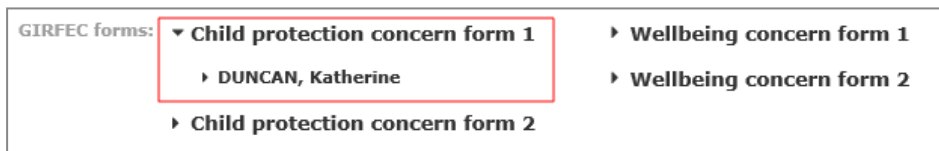
Overview: Kat has begun to behave strangely, becoming withdrawn over the past few weeks. This has been reported by a number of staff and is extremely out of character. Needs investigating.

Record visible to all staff:

Record visible to specific staff: ANDREWS, Ellie J, Form Tutor, Head of Acad..., Head of Boar..., Head of Year, HEYWOOD, Colin, ORLAND, Susan...

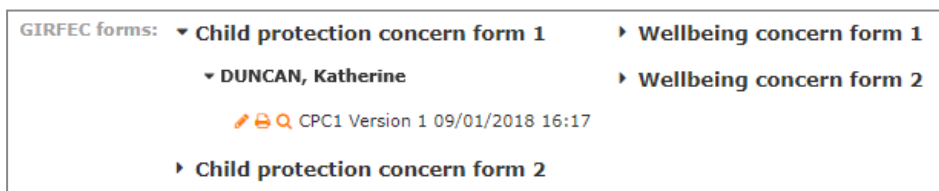
GIRFEC forms: Child protection concern form 1, Wellbeing concern form 1, Child protection concern form 2, Wellbeing concern form 2

- Click on the name of the GIRFEC form you would like to view.
The text expands to show a list of pupils that forms have been completed for.



GIRFEC forms: **Child protection concern form 1** ▶ Wellbeing concern form 1
 ▶ DUNCAN, Katherine ▶ Wellbeing concern form 2
 ▶ Child protection concern form 2


- Click on the name of the relevant pupil.
The text expands to show a list of forms completed about this pupil.




GIRFEC forms: **Child protection concern form 1** ▶ Wellbeing concern form 1
 ▶ DUNCAN, Katherine ▶ Wellbeing concern form 2
 📄 🔍 CPC1 Version 1 09/01/2018 16:17
 ▶ Child protection concern form 2

5. Do ONE of the following:


» To amend a form:

- a. Click  next to it. The relevant form appears.
- b. Make your changes.
- c. Click **Save**.

» To print a form:

- a. Click  next to the form. A print friendly version of the form appears.
The **Print** dialog opens.
- b. Select the relevant printer and click **Print**.

» To view a form:

- a. Click  next to it. The relevant form appears.
- b. When you have finished viewing the record, click **Cancel** to go to the record's **Edit a Pastoral Record** screen.

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CHAPTER 5

Deleting Pastoral Records

This chapter discusses the following:

About Deleting Pastoral Records	42
Soft Deleting Pastoral Records	43
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Hard Deleting Pastoral Records	46
Soft Deleting Pastoral Management Record Notes	49
Hard Deleting Pastoral Management Record Notes	51
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About Deleting Pastoral Records

There are two ways of deleting pastoral records and notes (including actions). Depending upon profile permissions, users are able to 'soft' delete and / or 'hard' delete records / notes. Any user with relevant access levels can 'soft' delete, meaning that the record's status changes to 'deleted' or that a note's status changes to 'Deleted Notes/Actions'. Only those with Pastoral Management Administrator access can 'hard' delete records / notes, meaning that they are removed from the system. Pastoral Management Administrators can also undo soft deletes to reinstate records / notes. Soft deleted notes cannot be amended and can only be seen by Pastoral Management Administrators.

As well as being able to permanently delete records / notes that have been soft deleted by colleagues, System Administrators and Pastoral Management Administrators can also delete pastoral management records in bulk using the **Bulk Deletion of Pastoral Records** function. This enables schools to remove obsolete records that are no longer required for legislative reasons and to help meet organisations' GDPR responsibilities.


For more information, see:

- » ["Soft Deleting Pastoral Records" on the facing page.](#)
- » ["Undoing Soft Deletes" on page 45.](#)
- » ["Hard Deleting Pastoral Records" on page 46.](#)
- » ["Soft Deleting Pastoral Management Record Notes" on page 49.](#)
- » ["Hard Deleting Pastoral Management Record Notes" on page 51.](#)
- » ["Deleting Pastoral Records in Bulk" on page 53.](#)













Soft Deleting Pastoral Records

HOW TO SOFT DELETE A PASTORAL RECORD


1. Find the pastoral record that you would like to delete via the **Pastoral Management Dashboard** OR the **Pastoral Record Search** screen.

 If you are unsure how to find a record, see step 1 of "[Viewing Pastoral Records](#)" on page 26.

2. In the **Actions** column, click  next to the record you would like to delete.

Actions	Unread Changes	Pupil name(s)	Form	Reason(s)	Heading	Raised by	Status	Action required	Date	Last modified by
  		ABBOTT, Thomas James	Form 5B	In School Incidents	Racist Language	STRINGER, Robert	Open		12/02/2020	12/02/2020, STRINGER, Robert
  		ABBOTT, Isabel Francesca	Form 8A	Counselling Issues	Anxiety Issues	BAKER, Molly B	Open		31/01/2020	03/02/2020, STRINGER, Robert
  		ASHFIELD, Gemma Frances FARRELL, Eden BURCHER, Rebecca DAVIS, Callum	Form 11A Form 11A Form 11A Form 11A	In School Incidents	Conflict with other pupils	BRYANT, Melanie	Open		24/09/2019	11/11/2019, STRINGER, Robert

Page size: 5 10 25 50 100 Record(s): 5

 The options you see depend upon the permissions set by your System Administrator.

The relevant **Delete a Pastoral Record** screen appears.

Delete a Pastoral Record

Pastoral Management records are created to record details of any pastoral support provided to a pupil. Pastoral care involves work with pupils who are having problems of an academic, vocational, social, emotional or behavioural nature.

Delete **Cancel**

Pupil name(s):

Record reason(s):

Staff Name:

Date/Time:

Category:

Show alert against pupil:

Status:

Heading:

Overview:

Record visible to all staff:

GIRFEC forms:

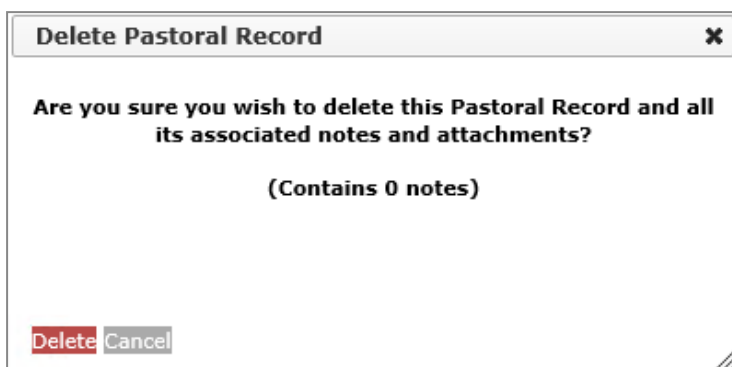
Documents:

Delete **Cancel**

Notes

No notes available. Either no notes have been added or you do not have permission to view them.

- Click **Delete**. The **Delete Pastoral Record** popup appears.



- If you are sure that you would like to delete this record, click **Delete**.

The **Pastoral Record Search** screen appears with the record removed from the grid. The record's status is changed to 'Deleted' for all non-administrative users.

! If you are a Pastoral Management Administrator, an undo option appears above the grid immediately after you have soft deleted a record. To undo the soft delete, click **Undo**. (This option is removed once you have navigated away from the screen.)

Actions	Unread Changes	Pupil name(s)
		DUNCAN, Katherine ●
		ABBOTT, Thomas James ●

Undoing Soft Deletes

HOW TO UNDO A SOFT DELETE

! Only Pastoral Management Administrators can search for and undo pastoral record soft deletions once the **Undo** button is no longer available on the **Pastoral Record Search** screen.

1. Go to **Pastoral / Behaviour > Pastoral Management > Search**.

The **Pastoral Record Search** screen appears.

The screenshot shows the 'Pastoral Record Search' interface. It includes search filters for Pupil name(s), Form, Reason(s), Heading, Raised by, Status, Action required, Date, and Search logged in Academic Year only. Below the filters is a table with the following data:

Actions	Unread Changes	Pupil name(s)	Form	Reason(s)	Heading	Raised by	Status	Action required	Date	Last modified by
Q		ABBOTT, Thomas James	Form 5B	In School Incidents	Racist Language	STRINGER, Robert	Open	<input type="checkbox"/>	12/02/2020	12/02/2020, STRINGER, Robert
Q		ABBOTT, Isabel Francesca	Form 8A	Counselling Issues	Anxiety Issues	BAKER, Molly B	Open	<input checked="" type="checkbox"/>	31/01/2020	03/02/2020, STRINGER, Robert
Q		ASHFIELD, Gemma Frances FARRELL, Eden BURCHER, Rebecca DAVIS, Callum	Form 11A Form 11A Form 11A Form 11A	In School Incidents	Conflict with other pupils	BRYANT, Melanie	Open	<input checked="" type="checkbox"/>	24/09/2019	11/11/2019, STRINGER, Robert

2. From the **Status** drop list, select 'Deleted' to display those pastoral management records that have been soft deleted. Click **Search**.

This screenshot shows the search filters with the 'Status' dropdown menu set to 'Deleted'. The 'Search' button is highlighted in orange.

The screen refreshes to show a list of records that have been soft deleted.

Actions	Unread Changes	Pupil name(s)	Form	Reason(s)	Heading	Raised by	Status	Action required	Deleted Date	Last modified by
Q		ABBOTT, Thomas James	Form 5B	In School Incidents	Racist Language	STRINGER, Robert	Deleted	<input type="checkbox"/>	24/02/2020	12/02/2020, STRINGER, Robert
Q		DUNCAN, Katherine	Form 5A	Antisocial Behaviour	Unusual Behaviour	STRINGER, Robert	Deleted	<input type="checkbox"/>	24/02/2020	24/02/2020, STRINGER, Robert
Q		ASHFIELD, Gemma Frances	Form 11A	In School Incidents, Other	Mobility Support	STRINGER, Robert	Deleted	<input type="checkbox"/>	24/02/2020	24/02/2020, STRINGER, Robert

3. (Optional) Use the **Deleted Date** fields that appear to select when the records were soft deleted and click **Search**.

- In the **Status** column, select 'Restore' using the drop list next to the record that you would like to reinstate. The **Restore** popup appears.

✕

Are you sure you want to restore this record?

Restore
Cancel

- Read the message and, if you are happy to restore the record, click **Restore**.
The record is now reinstated and will appear in relevant Pastoral Management module grids.

Hard Deleting Pastoral Records

HOW TO HARD DELETE A PASTORAL RECORD

!

Only Pastoral Management Administrators can search for and delete pastoral records that have been soft deleted.

- Go to **Pastoral / Behaviour > Pastoral Management > Search**.

The **Pastoral Record Search** screen appears.

3sys® ACADEMIC
Pastoral Record Search

The Camelot School
Academic Year 2019 - 2020
Supervisor

Search:

Pupil name(s):

Heading:

Category:

Section:

Action required by date: -

Search logged in Academic Year only:

Form:

Raised by:

Year Group:

Action required:

Date: -

Reason(s):

Status:

Group Tutor:

Action required by staff:

Select pupil type:

Search
Clear
Save
Delete

Add

Actions	Unread Changes	Pupil name(s)	Form	Reason(s)	Heading	Raised by	Status	Action required	Date	Last modified by
Q		ABBOTT, Thomas James ● A	Form 5B	In School Incidents	Racist Language	STRINGER, Robert	Open	<input type="checkbox"/>	12/02/2020	12/02/2020, STRINGER, Robert
Q		ABBOTT, Isabel Francesca ● A	Form 8A	Counselling Issues	Anxiety Issues	BAKER, Molly B	Open	<input checked="" type="checkbox"/>	31/01/2020	03/02/2020, STRINGER, Robert
Q		ASHFIELD, Gemma Frances ● A FARRELL, Eden ● A BURCHER, Rebecca ● A DAVIS, Callum ● A	Form 11A Form 11A Form 11A Form 11A	In School Incidents	Conflict with other pupils	BRYANT, Melanie	Open	<input checked="" type="checkbox"/>	24/09/2019	11/11/2019, STRINGER, Robert

Page size: 5 10 25 50 100 Record(s): 3

46

- From the **Status** drop list, select 'Deleted' to display those pastoral management records that have been soft deleted. Click **Search**.

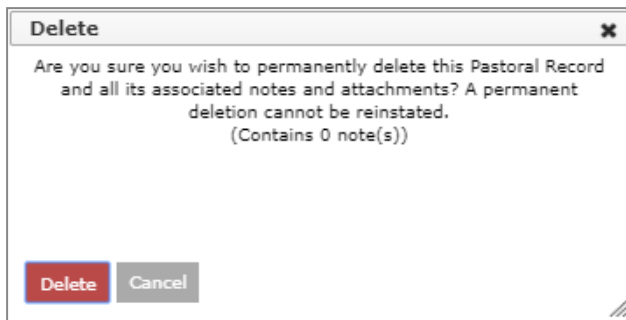
The screen refreshes to show a list of records that have been soft deleted.

Actions	Unread Changes	Pupil name(s)	Form	Reason(s)	Heading	Raised by	Status	Action required	Deleted Date	Last modified by
		ABBOTT, Thomas James	Form 5B	In School Incidents	Racist Language	STRINGER, Robert	Deleted	<input type="checkbox"/>	24/02/2020	12/02/2020, STRINGER, Robert
		DUNCAN, Katherine	Form 5A	Antisocial Behaviour	Unusual Behaviour	STRINGER, Robert	Deleted	<input type="checkbox"/>	24/02/2020	24/02/2020, STRINGER, Robert
		ASHFIELD, Gemma Frances	Form 11A	In School Incidents, Other	Mobility Support	STRINGER, Robert	Deleted	<input type="checkbox"/>	24/02/2020	24/02/2020, STRINGER, Robert

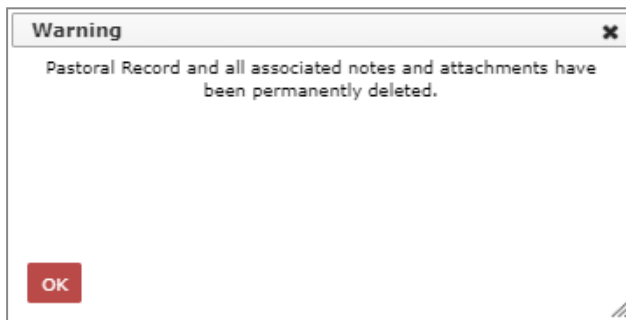
Page size: 5 10 25 50 100 Record(s): 3

- (Optional) Use the **Deleted Date** fields that appear to select when the records were soft deleted and click **Search**.
- In the **Actions** column, click next to the record that you would like to permanently delete. The relevant **Delete a Pastoral Record** screen appears.

5. Click **Delete**. The **Delete Pastoral Record** popup appears.



6. Read the message and, if you are happy to permanently delete the record, click **Delete**. A **Warning** popup appears.



7. Click **OK**. The **Pastoral Search** screen appears with the record removed from the grid.


Soft Deleting Pastoral Management Record Notes

HOW TO SOFT DELETE A PASTORAL MANAGEMENT RECORD NOTE

1. Find the pastoral record that the note / action you would like to delete is linked to via the **Pastoral Management Dashboard** OR the **Pastoral Record Search** screen.



If you are unsure how to find a record, see step 1 of "[Viewing Pastoral Records](#)" on page 26.

2. In the **Actions** column, click  next to the record that you would like to edit.
The relevant **Edit a Pastoral Record** screen appears.
3. Scroll down to the **Notes** section and click **Edit** next to the note that you would like to amend / remove.

Transfer Complete

[Edit](#) [Mark as Complete](#)

Action By: 31 January 2019 || PARSONS, Albert Trevor (22 January 2019)

Category: Low Priority

Note: Andy has successfully transferred to the school. This file can be closed.

Pupil name(s): MORGAN, Andrew

Action Summary: Close file.

Action Note: Close the file and archive it.

Action By: STRINGER, Robert

Note Visible to All
Staff:

GIRFEC forms:

- Click **Delete** at the bottom of the note.

Transfer Complete
Mark as Complete

Action By: 31 January 2019 || PARSONS, Albert Trevor (22 January 2019)

Category: Low Priority ▼

Heading: Transfer Complete

Note: Andy has successfully transferred to the school. This file can be closed.

Pupil name(s): MORGAN, Andrew 🔍
1 Pupil(s)

Action required:

Action summary: Close file.

Action Note: Close the file and archive it.

Action by date: 31/01/2019 📅 12 : 53 ⌚

Action by: STRINGER, Rob... 🔍

Documents: Browse
Click 'Browse' to select files for upload or drop files here.

Make this note visible to all staff:

Save
Delete
Cancel

A **Warning** popup appears.


Warning
✕

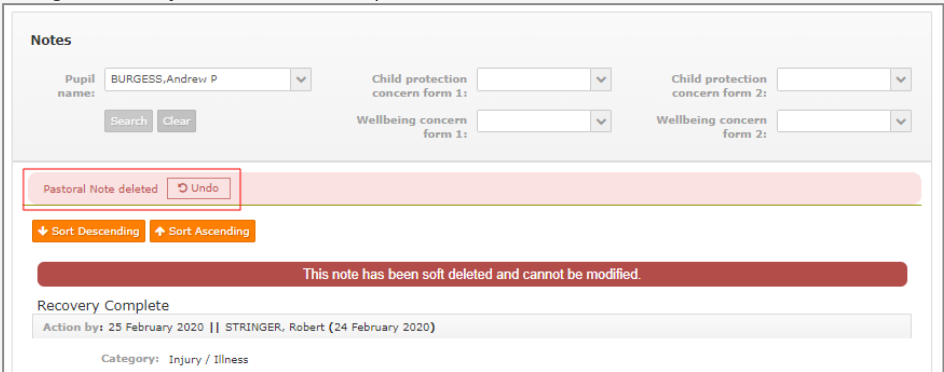
Are you sure you want to delete this note?

Delete
Cancel

5. Read the **Warning** popup and, if you are happy to proceed, click **Delete**.


The **Notes** section of the relevant **View a Pastoral Record** screen appears.

 An **Undo** option appears above the grid immediately after you have soft deleted a note. To undo the soft delete, click **Undo**. (This option disappears once you have navigated away from the screen.)



Hard Deleting Pastoral Management Record Notes

HOW TO HARD DELETE A PASTORAL MANAGEMENT RECORD NOTE

 Only Pastoral Management Administrators can search for and remove soft deleted pastoral notes and records.

1. Go to **Pastoral / Behaviour > Pastoral Management > Search**.

The **Pastoral Record Search** screen appears.

2. From the **Status** drop list, select 'Deleted Notes/Actions'.
3. (Optional) Enter additional search criteria, as required.
4. Click **Search**.

A list of pastoral management records that meet your search criteria appear in the grid.

5. In the **Actions** column, click  next to the record that you would like to amend.

The relevant **Edit a Pastoral Record** screen appears.

6. Scroll down to the **Notes** section and find the soft deleted note.

This note has been soft deleted and cannot be modified.

Transfer Complete Delete

Action By: 31 January 2019 || PARSONS, Albert Trevor (22 January 2019)

Category: Low Priority

Note: Andy has successfully transferred to the school. This file can be closed.

Pupil name(s): MORGAN, Andrew

Action Summary: Close file.

Action Note: Close the file and archive it.

Action By: STRINGER, Robert

Note Visible to All Staff:

GIRFEC forms:

7. Click **Delete**. A **Delete** popup appears.

Delete ✕

Are you sure you wish to permanently delete this note? A permanent deletion cannot be reinstated.

Delete
Cancel

8. Read the popup and, if you are happy to permanently delete the note, click **Delete**.

!

This action CANNOT be reversed.

The **Edit a Pastoral Record** screen appears and the note has been removed.

Deleting Pastoral Records in Bulk

HOW TO DELETE PASTORAL RECORDS IN BULK



Only System Administrators and Pastoral Management Administrators have access to this function.

1. Go to **Pastoral / Behaviour > Pastoral Management > Bulk Deletion**.

The **Bulk Deletion of Pastoral Records** screen appears.

The screenshot shows the 'Bulk Deletion of Pastoral Records' interface. At the top, there are search and navigation icons. Below is a breadcrumb trail: 'Pastoral / Behaviour > Bulk Deletion of Pastoral Records'. The main area contains search filters: 'Pupil name', 'Form', 'Status' (set to 'Closed'), 'Record date before', 'Archived' (set to 'Yes'), 'Date of birth before', 'Include past pupils' (set to 'Past only'), 'Last action before', and 'Reason' (set to 'All'). There are 'Search' and 'Clear' buttons. Below the filters are 'Delete' and 'Clear' buttons. At the bottom, there is a table header with columns: 'Pupil name', 'Date of Birth', 'Year', 'Form', 'Reason', 'Category', 'Heading', and 'Status'. The table currently shows 0 records.

2. Use one or more of the search options at the top of the screen to find the records that you would like to delete.
3. Click **Search**. Your results populate the grid.


The screenshot shows the same 'Bulk Deletion of Pastoral Records' interface, but now with search results. The search filters are the same as in the previous screenshot. The table now contains 10 records. The table header is: 'Pupil name', 'Date of Birth', 'Year', 'Form', 'Reason', 'Category', 'Heading', and 'Status'. The records are as follows:

Pupil name	Date of Birth	Year	Form	Reason	Category	Heading	Status
<input type="checkbox"/> ADAMS, Lauren S	04/01/2003	11	11A	Illness (Short Term)	Medium Priority	Minor Injury	Closed
<input type="checkbox"/> ADAMS, Sarah J	21/02/2002	07	07A	Illness (Short Term)	Low Priority	Heavy Cold	Closed
<input type="checkbox"/> ALLAN, Tom	02/10/1995	13	13	Antisocial Behaviour	Critical	Fighting at Lunchtime	Closed
<input type="checkbox"/> DAVIES, John	06/09/2008	00R	00R				
<input type="checkbox"/> ALTON, Benjamin	10/01/2008	01	01A				
<input type="checkbox"/> BURTON, James	14/11/2006	02	02B				
<input type="checkbox"/> BELL, Edward	07/02/2005	04	04B				
<input type="checkbox"/> ASLETT, Fletcher	29/10/2000	09	09A	Relocation	Critical	New Pupil	Closed
<input type="checkbox"/> BATES, Karen Jane	30/11/1995	13	13	Relocation	Medium Priority	New Pupil	Closed

At the bottom, the table shows 10 records and a page size of 10.

4. To select the records to delete, do ONE of the following:

- » To select ALL of the records listed on the screen, tick the check box in the **Pupil name** column header.

 Only the records you can see on this page are selected, even in you have several pages of results. This prevents accidental deletions from other pages.

- » To select specific records, tick the check box alongside the record(s) you would like to delete.

Bulk Deletion of Pastoral Records

Pupil name: Date of birth before:

Form: Include past pupils:

Status: Last action before:

Record date before: Reason:

Archived: Remember this search:

<input type="checkbox"/> Pupil name	Date of Birth	Year	Form	Reason	Category	Heading	Status
<input type="checkbox"/> ADAMS, Lauren S	04/01/2003	11	11A	Illness (Short Term)	Medium Priority	Minor Injury	Closed
<input checked="" type="checkbox"/> ADAMS, Sarah J	21/02/2002	07	07A	Illness (Short Term)	Low Priority	Heavy Cold	Closed
<input type="checkbox"/> ALLAN, Tom	02/10/1995	13	13	Antisocial Behaviour	Critical	Fighting at Lunchtime	Closed
<input type="checkbox"/> DAVIES, John	06/09/2008	00R	00R				
<input type="checkbox"/> ALTON, Benjamin	10/01/2008	01	01A				
<input type="checkbox"/> BURTON, James	14/11/2006	02	02B				
<input type="checkbox"/> BELL, Edward	07/02/2005	04	04B				
<input checked="" type="checkbox"/> ASLETT, Fletcher	29/10/2000	09	09A	Relocation	Critical	New Pupil	Closed
<input checked="" type="checkbox"/> BATES, Karen Jane	30/11/1995	13	13	Relocation	Medium Priority	New Pupil	Closed

Page Size: Records:

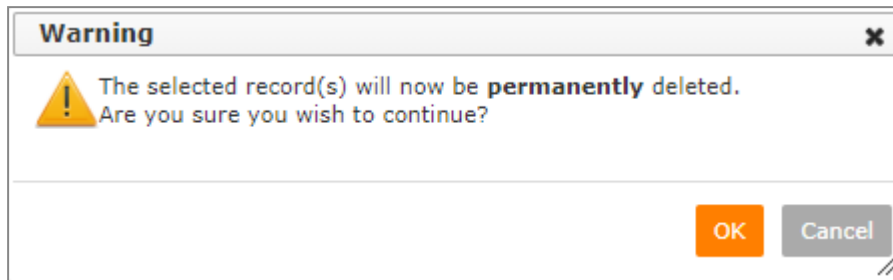
5. Click **Delete**.

A **Warning** popup appears.

Warning

Are you sure you want to delete the selected 3 record(s) and associated notes?

6. Read the message and, if you would like to proceed, click **OK**.
A **Warning** popup appears.



7. Read the message and, if you are happy to proceed, click **OK**.
The selected records and their related notes / actions are permanently deleted.

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Transferring Record Ownership

This chapter discusses the following:

About Transfer of Ownership	58
Transferring Ownership of Pastoral Management Records	58
Transferring Ownership of Pastoral Management Record Actions	59
Adding Staff / Roles to Pastoral Records in Bulk	61
Removing Staff from Pastoral Records in Bulk	62

CHAPTER 6

About Transfer of Ownership

3sysACADEMIC includes a **Transfer of Ownership** function, which enables you to:

- » Reassign pastoral records and actions in bulk, swapping one name / role for another across several records.
- » Add staff / roles to several records simultaneously.
- » Remove staff from several records simultaneously.

This is a useful tool to use when there are staff changes or pupils change tutor groups, for example.

For more information, see:

- » "Transferring Ownership of Pastoral Management Records" below.
- » "Transferring Ownership of Pastoral Management Record Actions" on the facing page.
- » "Adding Staff / Roles to Pastoral Records in Bulk" on page 61.
- » "Removing Staff from Pastoral Records in Bulk" on page 62.

Transferring Ownership of Pastoral Management Records

HOW TO TRANSFER OWNERSHIP OF PASTORAL MANAGEMENT RECORDS

1. Go to **Pastoral / Behaviour > Pastoral Management > Transfer of Ownership**.

The **Transfer of Ownership** screen appears.

2. Do ONE of the following to add the name of the current record owner to the **Staff name** search field:
 - » Begin typing the person's name in the **Staff name** field and select it from the list that appears.
 - » Click and use the **Staff Search** dialog.
3. (Optional) Use the other search options to find the relevant record(s).

 'Year' refers to the form year.

4. Click **Search**.

A list of records and records with actions assigned to the member of staff appear in the grid.

5. Tick the relevant **Pupil name** check box(es).

Actions	<input checked="" type="checkbox"/> Pupil name	Year	Form	Reason	Category	Heading	Status	<input type="checkbox"/> Re-assign pastoral record to		
+	<input checked="" type="checkbox"/>	KERR, Rebecca	10	10A	Bullying	High Priority	Allegation of Bullying	Open	⚠	Q
		CAVENDISH, Mary	11	11A						
	<input checked="" type="checkbox"/>	ASLETT, Fletcher	09	09A	Relocation	Medium Priority	New Pupil	Open	⚠	Q
	<input checked="" type="checkbox"/>	ADAMS, Sarah J	07	07A	Relocation	Low Priority	Returned Pupils	Open	⚠	Q
	<input checked="" type="checkbox"/>	ADAMS, Lauren S	11	11A						

⚠ appears in the **Reassign pastoral record to** fields when a record has been selected but the user has not specified to whom the record should be transferred.

6. (Optional) To transfer ALL the records to the SAME person, tick the **Re-assign pastoral record to** check box.

Re-assign pastoral record to

7. In the **Re-assign pastoral record to** column for each record, click and use the **Staff Search** dialog to find and select the record's new owner.

Actions	<input type="checkbox"/> Pupil name	Year	Form	Reason	Category	Heading	Status	<input type="checkbox"/> Re-assign pastoral record to	
+	<input type="checkbox"/>	KERR, Rebecca	10	10A	Bullying	High Priority	Allegation of Bullying	Open	Q
		CAVENDISH, Mary	11	11A					
	<input type="checkbox"/>	ASLETT, Fletcher	09	09A	Relocation	Medium Priority	New Pupil	Open	Q
	<input type="checkbox"/>	ADAMS, Sarah J	07	07A	Relocation	Low Priority	Returned Pupils	Open	Q
	<input type="checkbox"/>	ADAMS, Lauren S	11	11A					



If you ticked the **Re-assign pastoral record to** check box in order to transfer all the selected records to the same person, the first name you choose will populate all the relevant **Re-assign pastoral record to** fields automatically.

8. Click **Transfer**.


The record(s) are transferred to the selected member(s) of staff and the relevant Pastoral Management notifications are triggered.

Transferring Ownership of Pastoral Management Record Actions

HOW TO TRANSFER OWNERSHIP OF PASTORAL MANAGEMENT RECORD ACTIONS

1. Go to **Pastoral / Behaviour > Pastoral Management > Transfer of Ownership**.

The **Transfer of Ownership** screen appears.


- Do ONE of the following to add the name of the current record owner to the **Staff name** search field:
 - » Begin typing the person's name in the **Staff name** field and select it from the list that appears.
 - » Click  and use the **Staff Search** dialog.

- (Optional) Use the other search options to find the relevant record(s).

 'Year' refers to the form year.


- Click **Search**.


A list of records and records with actions assigned to the member of staff appear in the grid.


- In the **Actions** column, click  to expand the record details and show a list of actions.


Actions	<input type="checkbox"/> Pupil name	Year	Form	Reason	Category	Heading	Status	 <input type="checkbox"/> Re-assign pastoral record to
	<input type="checkbox"/> KERR, Rebecca CAVENDISH, Mary	10 11	10A 11A	Bullying	High Priority	Allegation of Bullying	Open	
	<input type="checkbox"/> ASLETT, Fletcher	09	09A	Relocation	Medium Priority	New Pupil	Open	
	<input type="checkbox"/> ADAMS, Sarah J ADAMS, Lauren S	07 11	07A 11A	Relocation	Low Priority	Returned Pupils	Open	

- (Optional) To transfer ALL the actions allocated to the relevant member of staff for this Pastoral Management record to the SAME person, tick the **Re-assign Pastoral action to** check box.

 Only the staff name displayed in the search will be reassigned to the selection. Any other names listed in the **Re-assign pastoral action to** column will NOT be reassigned.

Actions	<input type="checkbox"/> Pupil name	Year	Form	Reason	Category	Heading	Status	 <input type="checkbox"/> Re-assign pastoral record to
	<input type="checkbox"/> KERR, Rebecca CAVENDISH, Mary	10 11	10A 11A	Bullying	High Priority	Allegation of Bullying	Open	
	<input type="checkbox"/> Pupil name	Year	Form	Action category	Action heading	Action summary	Action By	 <input type="checkbox"/> Re-assign pastoral action to
	CAVENDISH, Mary	11	11A	High Priority	Interview Mary	Interview Mary	STRINGER, Rob...	

- In the **Re-assign pastoral record action to** column for each record, click  and use the **Staff Search** dialog to find and select the record's new owner.

 If you ticked the **Re-assign pastoral action to** check box in order to transfer all the selected records to the same person, the first name you choose will populate all the relevant **Re-assign pastoral record to** fields automatically.

- Click **Transfer**.

The action(s) are transferred to the selected member(s) of staff and the relevant Pastoral Management notifications are triggered.

Adding Staff / Roles to Pastoral Records in Bulk

HOW TO ADD STAFF / ROLES TO PASTORAL RECORDS IN BULK

1. Go to **Pastoral / Behaviour > Pastoral Management > Transfer of Ownership**.
The **Transfer of Ownership** screen appears.
2. Use the **Action required** drop list to select 'Add Visibility'.

3. Use one or more of the search options at the top of the screen to find the record(s) that you would like to add a member of staff / role to.
4. Click **Search**. Your search results appear in the grid.
5. To select the relevant records, do ONE of the following:
 - » To select ALL of the records / notes / actions listed on this screen, tick the check box in the **Pupil name** column header.
 - » To select specific records / notes / actions, tick the check box alongside the relevant records.

TIP To expand the record details and show a list of associated actions, in the **Actions** column, click **+**.

When one or more records are selected, the **Add Visibility** button becomes live.

Actions	<input checked="" type="checkbox"/> Pupil name	Year	Form	Reason	Category	Heading	Status	<input type="checkbox"/> Re-assign pastoral record to
	<input checked="" type="checkbox"/> MCKENNA, Cecilia	02	02B	Illness (Short Term)	Low Priority	Return following Flu	Open	

6. Click **Add Visibility**. The **Staff Search** dialog appears.
7. Use the **Staff Search** dialog to find the member of staff / role that you would like to add to the selected records.
8. Click on the person's name / the role.


The **Transfer of Ownership** screen reappears and the relevant staff can now see the selected records. If enabled, a pastoral notification appears confirming the changes.

Removing Staff from Pastoral Records in Bulk


HOW TO REMOVE STAFF FROM PASTORAL RECORDS IN BULK

1. Go to **Pastoral / Behaviour > Pastoral Management > Transfer of Ownership**.

The **Transfer of Ownership** screen appears.

2. To find records associated with the relevant member of staff, do one of the following:
 - » Begin typing the person's name in the **Staff name** field and select it from the list that appears.
 - » Click  alongside the **Staff name** field and use the **Staff Search** dialog to find the relevant name.
3. Use the **Action required** drop list to select 'Remove Visibility'.
4. (Optional) Use one or more of the remaining search options at the top of the screen to find specific record(s) that you would like to remove the member of staff / role from.
5. Click **Search**.
Your search results appear in the grid.
6. To select the relevant records, do ONE of the following:
 - » To select ALL of the records / notes / actions listed on this screen, tick the check box in the **Pupil name** column header.
 - » To select specific records / notes / actions, tick the check box alongside the relevant record(s).



To expand the record details and show a list of associated actions, in the **Actions** column, click .

When one or more records are selected, the **Remove Visibility** button becomes live.

Transfer of Ownership

Staff name: ANDREWS, Ellie J Q Status: All

Reason: All Pupil name: Year: Year group: Form: Action required: Remove Visibility

Remember this search: Search Clear

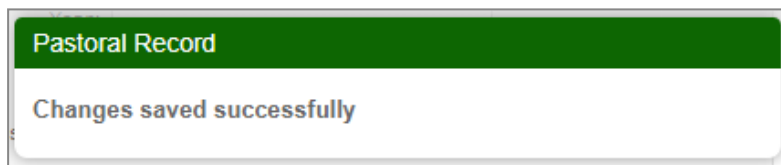
Remove Visibility Cancel

Actions	<input checked="" type="checkbox"/> Pupil name	Year	Form	Reason	Category	Heading	Status	Re-assign pastoral record to
+	<input checked="" type="checkbox"/> ASHFIELD, Gemma Frances	09	09A	Bereavement	High Priority	Grandmother has Passed Away	Open	
	<input checked="" type="checkbox"/> LAWSON, Elizabeth	00R	00R	Illness (Long Term)	Critical	Diagnosed with Illness	Open	

Page Size: 5 10 25 50 100 Records: 2

7. Click **Remove Visibility**.

The member of staff is removed from the selected pastoral management records. If enabled, a pastoral notification appears confirming the changes.



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Archiving Pastoral Records

This chapter discusses the following:

About Archiving Pastoral Records	66
Archiving Pastoral Management Records	67
Restoring Archived Pastoral Management Records	68

CHAPTER 7

About Archiving Pastoral Records

Pastoral records must be retained after they are resolved, meaning that the list of records on your system can build up and become difficult to navigate. To address this issue, 3sysACADEMIC enables Pastoral Management Administrators to archive records once the issues have been dealt with.

When a pastoral record is archived, the following screens are also affected:

- » **Pastoral Management Dashboard** - The record no longer appears on this screen.
- » **Pastoral Management Search** screen - The record no longer appears in searches.
- » **Transfer of Ownership** screen - The record no longer appears in searches.
- » **Pupils** screen - If a coloured icon appeared alongside a pupil's name due to the pastoral record's category, it is removed.

Q	✎	▼	<input type="checkbox"/>	ALT010	ALTON, Benjamin	★	👤	Ben	Form 1A
---	---	---	--------------------------	--------	-----------------	---	---	-----	---------

- » **Pupil Dashboard** - The record is no longer listed on the pupil's **Pastoral** tab.

In addition, archived records do NOT appear on the Child Protection report and any pastoral alerts triggered by the record that have been snoozed are cancelled. This prevents users receiving notifications about records that they can no longer access.

If a record is archived in error, it can be restored. It is then visible to users again. If a record is archived and restored, it is noted on the relevant audit log.

Audit No.	Pastoral Record/Note Heading	Date	Time	User	Area	Section	History	Details
2	Broken Leg	10/10/2018	15:05:46	STRINGER, Robert	Pastoral Record		Restore	
1	Broken Leg	10/10/2018	15:05:37	STRINGER, Robert	Pastoral Record		Archive	

For details, see:

- » ["Archiving Pastoral Management Records" on the facing page.](#)
- » ["Restoring Archived Pastoral Management Records" on page 68](#)

Archiving Pastoral Management Records

HOW TO ARCHIVE PASTORAL MANAGEMENT RECORDS

1. Go to **Pastoral / Behaviour > Pastoral Management > Archive Pastoral Records**.
The **Archive Pastoral Records** screen appears.

Actions	Pupil name	Year	Form	Reason	Category	Heading	Status
+	<input type="checkbox"/> CAVENDISH, Mary KERR, Rebecca	11 10	11A 10A	Bullying	High Priority	Allegation of Bullying	Closed
+	<input type="checkbox"/> ASLETT, Fletcher	09	09A	Relocation	Critical	New Pupil	Closed
+	<input type="checkbox"/> ADAMS, Lauren S	11	11A	Illness (Short Term)	Medium Priority	Minor Injury	Closed
+	<input type="checkbox"/> BATES, Karen Jane	13	13	Relocation	Medium Priority	New Pupil	Closed
+	<input type="checkbox"/> WATSON, Claire	08	08B	Illness (Long Term)	High Priority	Return to School after Injury	Closed

2. (Optional) Use the search options above the grid to find the record(s) you would like to archive.
3. Ensure that 'Archive' is selected using the **Action required** drop list. (This is selected by default.)
4. In the **Pupil name** column, tick the check box alongside each record that you would like to archive. (The **Archive** button becomes live once a record is selected.)
5. Click **Archive**. A **Warning** popup appears.

6. Read the warning and, if you are happy to proceed, click **OK**.
The record(s) are archived.

Restoring Archived Pastoral Management Records

HOW TO RESTORE ARCHIVED PASTORAL MANAGEMENT RECORDS

1. Go to **Pastoral / Behaviour > Pastoral Management > Archive Pastoral Records**.
The **Archive Pastoral Records** screen appears.

The screenshot shows the 'Archive Pastoral Records' interface. At the top, there are navigation icons and a search bar. Below the navigation, the breadcrumb path is 'Pastoral / Behaviour > Archive Pastoral Records'. The main area contains search filters: 'Pupil name', 'Form', 'Select pupil type' (set to 'All'), 'Status' (set to 'All'), 'Last action before', 'Record date before', 'Reason' (set to 'All'), and 'Action required' (set to 'Archive'). There are 'Search' and 'Clear' buttons. Below the filters, there are 'Archive' and 'Clear' buttons. A table displays the following records:

Actions	Pupil name	Year	Form	Reason	Category	Heading	Status
+	CAVENDISH, Mary KERR, Rebecca	11 10	11A 10A	Bullying	High Priority	Allegation of Bullying	Closed
+	ASLETT, Fletcher	09	09A	Relocation	Critical	New Pupil	Closed
+	ADAMS, Lauren S	11	11A	Illness (Short Term)	Medium Priority	Minor Injury	Closed
+	BATES, Karen Jane	13	13	Relocation	Medium Priority	New Pupil	Closed
+	WATSON, Claire	08	08B	Illness (Long Term)	High Priority	Return to School after Injury	Closed

At the bottom, there are pagination controls: 'Page Size' (5, 10, 25, 50, 100) and 'Records: 47'.

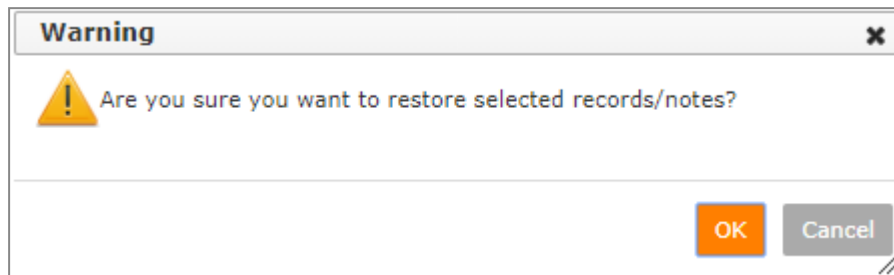
2. (Optional) Use the search options above the grid to find the record(s) you would like to restore.
3. Use the **Action required** drop list to select 'Restore' and click **Search**.
The grid refreshes to show archived records only.

This screenshot shows the same 'Archive Pastoral Records' interface, but with the 'Action required' dropdown menu set to 'Restore'. The 'Search' button is highlighted with a red box. Below the filters, there are 'Restore' and 'Clear' buttons. The table now displays the following records:

Actions	Pupil name	Year	Form	Reason	Category	Heading	Status
+	GUTHRIE, Kate	09	09A	Antisocial Behaviour	Low Priority	Rudeness	Closed
	ALLEN, David	04	04B	Illness (Long Term)	Medium Priority	Broken Leg	Open
+	WATSON, Claire	08	08B	Illness (Long Term)	High Priority	Return to School after Injury	Closed

At the bottom, the pagination controls show 'Page Size' (5, 10, 25, 50, 100) and 'Records: 3'.

- In the **Pupil name** column, tick the check box alongside each record that you would like to restore. (The **Restore** button becomes live once a record is selected.)
- Click **Restore**. A **Warning** popup appears.



- Read the warning and, if you are happy to proceed, click **OK**.
The record is restored and available to users elsewhere in the system.

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Reporting and Auditing

This chapter discusses the following:

About Pastoral Record Reporting and Auditing	72
Generating a Pastoral Record Audit (Administrators Only)	73
Accessing the Child Protection Concern Report (Scottish Schools Only)	74

CHAPTER 8

About Pastoral Record Reporting and Auditing

This section outlines:

- » How Administrators can audit individual pastoral records, producing a report which shows changes made.
- » How to access and use the Child Protection Concern (CPC) Report. (This function relates to GIRFEC requirements for Scottish schools.)

For details see:

- » ["Generating a Pastoral Record Audit \(Administrators Only\)" on the facing page.](#)
- » ["Accessing the Child Protection Concern Report \(Scottish Schools Only\)" on page 74.](#)







The options you see depend upon the permissions set by your System Administrator.

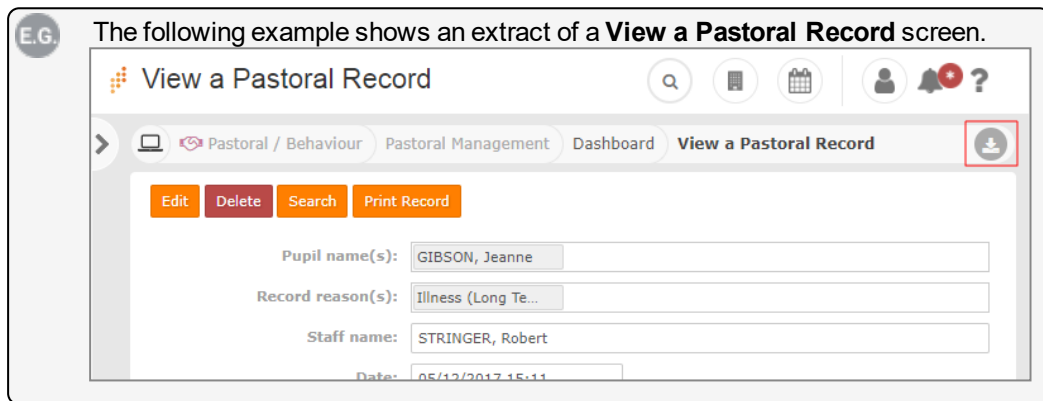
Generating a Pastoral Record Audit (Administrators Only)


HOW TO GENERATE A PASTORAL RECORD AUDIT (ADMINISTRATORS ONLY)

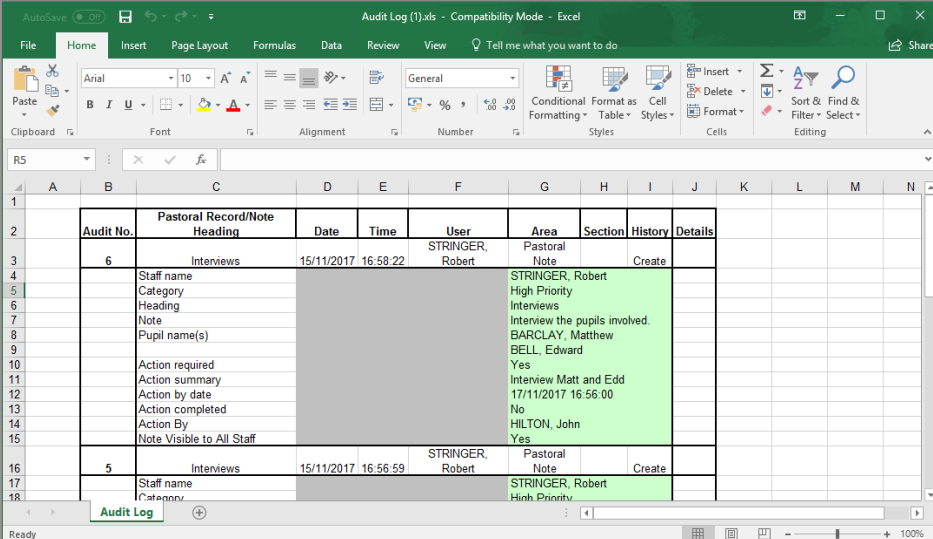
1. Find the pastoral record that you would like to audit via the **Pastoral Management Dashboard** OR the **Pastoral Record Search** screen.

 If you are unsure how to find a record, see step 1 of "[Viewing Pastoral Records](#)" on page 26.

2. In the **Actions** column, click on ,  or .
The **View a Pastoral Record**, **Edit a Pastoral Record** or **Delete a Pastoral Record** screen appears, as appropriate.



3. In the top, right-hand corner, click  to open, view, download and / or save an audit trail in the form of an MS Excel spreadsheet detailing historic changes made to the record.



Audit No.	Pastoral Record/Note Heading	Date	Time	User	Area	Section	History	Details
6	Interviews	15/11/2017	16:58:22	STRINGER, Robert	Pastoral Note		Create	
	Staff name				STRINGER, Robert			
	Category				High Priority			
	Heading				Interviews			
	Note				Interview the pupils involved.			
	Pupil name(s)				BARCLAY, Matthew			
	Action required				BELL, Edward			
	Action summary				Yes			
	Action by date				Interview Matt and Edd			
	Action completed				17/11/2017 16:56:00			
	Action By				No			
	Note Visible to All Staff				HILTON, John			
					Yes			
5	Interviews	15/11/2017	16:56:59	STRINGER, Robert	Pastoral Note		Create	
	Staff name				STRINGER, Robert			
	Category				High Priority			

Accessing the Child Protection Concern Report (Scottish Schools Only)

HOW TO ACCESS THE CHILD PROTECTION CONCERN REPORT


1. Go to **Pastoral / Behaviour > Pastoral Reports > Child Protection Concern**.

The **Child Protection Concern** screen appears, showing details of the child concern cases that you have access to.

The purpose of this report is to provide an overview of Child Protection cases over time and can be a helpful document for Governors and Inspectors seeking to gain an overview of Child Protection cases in a school over a period of time. It also provides a helpful overview for the Child Protection Co-ordinator of the status of ongoing cases.

Name	Year & F...	Date of B...	Date Refer...	Date Concern Passed...	Reason Not Passed...	I...	C...	CPCC D...	Placed On Re
ADAMS, Michael Charles	YEAR12 - Year 12 form A (Lower Sixth)	08/07/1993	18/07/2016		Will do tomorrow	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
ALDER, Claire D	YEAR13 - Year 13 form B (Upper Sixth)	06/04/1992	12/07/2016		Not applicable	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
BATES, Belinda		05/07/2007				<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>

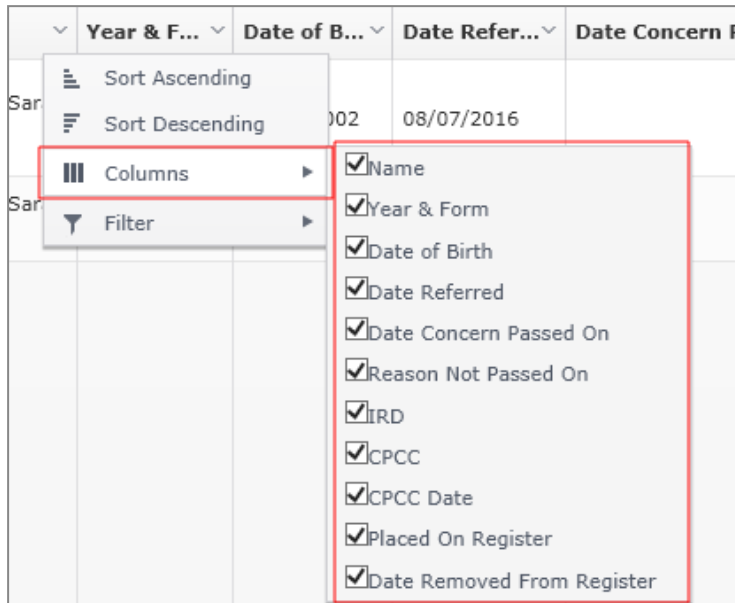
Page 1 of 1 20 items per page 1 - 3 of 3 items

 The options you see depend upon the permissions set by your System Administrator.

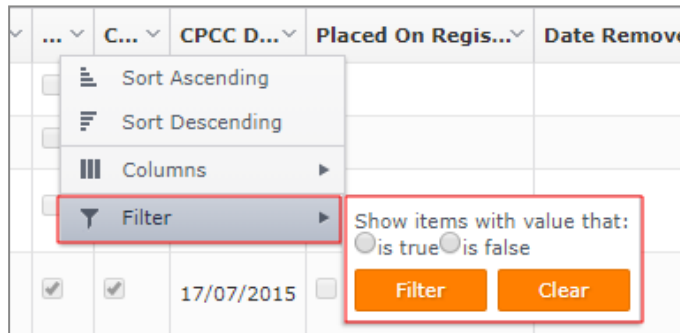
2. (Optional) Sort the data by a particular column by clicking next to the relevant column heading and selecting 'Sort Ascending' or 'Sort Descending'.

Year & F...	Date of B...
Sort Ascending	002
Sort Descending	002
Columns	
Filter	002

3. (Optional) Show or hide columns as required by clicking any and 'Columns'. Tick the check boxes for each column that should be visible.



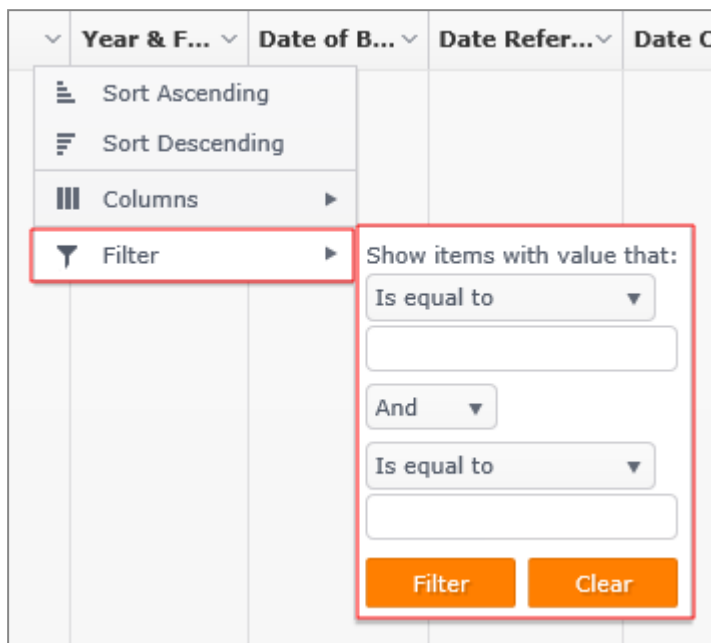
4. (Optional) To filter by data shown in columns containing check boxes:
- Click in the relevant column header(s) and click **Filter**.



- Select the true or false options, as required, and click **Filter**.

5. (Optional) To filter by data shown as text, e.g. names, dates, etc:

- a. Click in the relevant column header(s) and click **Filter**.
- b. In the **Filter** popup, use the first drop list to select how the field contents should relate to your filter criterion, e.g. 'Is equal to', 'Starts with', 'Contains', 'Is null' or 'Is empty'.

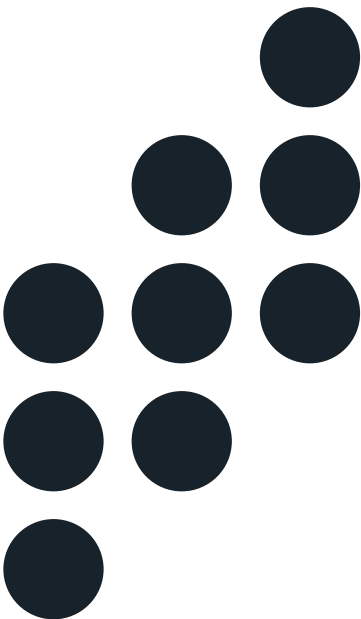


- c. Type your filter criterion in the second field.
- d. (Optional) To filter by two criteria:
 - » Use the second drop list to select 'And' to filter by both criteria OR select 'Or' for the software to look for either feature specified.
 - » Use the third drop list to select how the field contents should relate to your second filter criterion, e.g. 'Is equal to', 'Starts with', etc.
 - » Type your filter criteria in the bottom, empty field.
- e. Click **Filter**.

6. To clear a filter, click in the relevant column header(s) and click **Filter** and **Clear**.

7. (Optional) Click  above the **Child Protection Concern** grid and follow the instructions to export the data to MS Excel.

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