

3sysACADEMIC

Pastoral Management User Guide



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CONTENTS

CHAPTER 1 Introduction

CHAPTER 2 Pastoral Management

About Pastoral Management	8
About GIRFEC	10
Adding Pastoral Records	12
Adding Pastoral Records	13
Adding Pastoral Record Notes	23
Maintaining Pastoral Records	30
Viewing Pastoral Records	32
Viewing GIRFEC Forms (Scottish Schools Only)	35
Printing GIRFEC Forms (Scottish Schools Only)	38
Editing Pastoral Records	41
Editing Pastoral Record Notes	44
Marking Pastoral Record Actions 'Complete'	47
Accessing the Child Protection Concern Report	50
Deleting Pastoral Records	53

CHAPTER 3 Configuring Pastoral Management

Configuring Pastoral Management	58
Setting up Record Types	58
Editing Record Types	59
Deleting Record Types	60
Setting up Categories	61
Viewing Categories	65
Editing Categories	66
Deleting Categories	67
Allocating Access to Pastoral Management	69
Configuring GIRFEC	72
Activating GIRFEC Options (Scottish Schools Only)	72
Allocating Access to the Child Protection Concern Report (Scottish Schools Only)	72

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Introduction

Welcome to the 3sysACADEMIC Pastoral Management User Guide.

The **Pastoral Management** module allows users to record and track a range of emotional and behavioural issues affecting pupils. As well as logging pastoral issues, you can add notes and actions to each instance, which then link to the relevant pupil(s) personal record and alerts for staff.

Scottish schools can also complete Getting It Right For Every Child (GIRFEC) information using the **Pastoral Management** module.

CHAPTER 1

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CHAPTER 2

Pastoral Management

This chapter discusses the following:

About Pastoral Management	8
About GIRFEC	10
Adding Pastoral Records	12
Adding Pastoral Records	13
Adding Pastoral Record Notes	23
Maintaining Pastoral Records	30
Viewing Pastoral Records	32
Viewing GIRFEC Forms (Scottish Schools Only)	35
Printing GIRFEC Forms (Scottish Schools Only)	38
Editing Pastoral Records	41
Editing Pastoral Record Notes	44
Marking Pastoral Record Actions 'Complete'	47
Accessing the Child Protection Concern Report	50
Deleting Pastoral Records	53

About Pastoral Management

The **Pastoral Management** module allows users to record and track a range of emotional and behavioural issues affecting pupils. As well as logging pastoral issues, you can add notes and actions to each instance, which then link to the relevant pupil(s) personal record and alerts for staff.

Using the **Pastoral Management** module, you can:

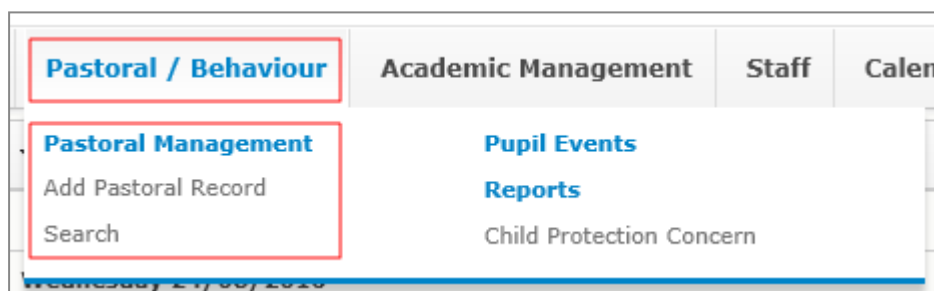
- » Record pastoral management issues for individuals or groups of pupils.
- » Add notes and actions to records.
- » Search records.
- » View, edit and delete pastoral records.
- » Create and update pastoral record types and categories.
- » Complete Getting It Right For Every Child (GIRFEC) forms. (Scottish Schools Only. For more information, see ["About GIRFEC" on page 10](#)).

What is **Pastoral Management**¹?

HOW TO ACCESS AND MANAGE PASTORAL RECORDS

Do ONE of the following:

- » Go to **Pastoral / Behaviour** and, from the **Pastoral Management** menu, click the relevant action.



- » Go to **Pastoral / Behaviour > Pastoral Management** and, from the **Pastoral**

¹Pastoral Management relates to supporting students with a range of personal, welfare or behavioural issues to ensure that they can continue their academic education.

Management dashboard, click on the appropriate action in the **Management** menu.

Pastoral Management
Dashboard

Management
[Add Pastoral Record](#)
[Search](#)
Configuration
[Record Type](#)
[Category](#)
[GIRFEC](#)
Reports
[Child Protection Concern](#)

Requires Action By Me					
Actions	Pupil Name(s)	Raised By	Status	Heading	Action Required By
	DAVIS Laura, DAVIS Steven	STRINGER, Robert	Open	Davis Divorce	04/07/2016
	CAVENDISH Mary, KERR Rebecca	STRINGER, Robert	Open	Allegation of Bullying	01/07/2016
	ALLAN Tom, ALTON Benjamin, BELL Edward, BURTON James, DAVIES John	STRINGER, Robert	Open	Fighting at Lunchtime	01/07/2016
	ADAMS Sarah J	STRINGER, Robert	Open	Allegations of Stealing	09/07/2016

Page 1 of 1

1 - 4 of 4 items

Recent Pastoral Records				
Actions	Pupil Name(s)	Status	Heading	Date
	DAVIS Laura, DAVIS Steven	Open	Davis Divorce	22/07/2016 11:10:00
	ADAMS Lauren S, ADAMS Sarah J, ALEXANDER-GUTHERIDGE Rachel	Open	CPC	12/07/2016 10:31:00
	DUNCAN Katherine	Open	Unusual Behaviour	12/07/2016 09:31:00
	ADAMS Sarah J	Open	Allegations of Stealing	08/07/2016 09:20:00
	ADAMS Lauren S, ADAMS Sarah J	Open	Playground chat	07/07/2016 15:35:00

[Search More Pastoral Records](#)

For more details, see:

- » "Adding Pastoral Records" on page 12.
- » "Maintaining Pastoral Records" on page 30.

HOW TO CONFIGURE PASTORAL RECORDS

- » Go to **Pastoral / Behaviour > Pastoral Management** and click on the appropriate action in the **Pastoral Management** dashboard's **Configuration** menu.

Pastoral Management
Dashboard

Management
[Add Pastoral Record](#)
[Search](#)
Configuration
[Record Type](#)
[Category](#)
[GIRFEC](#)
Reports
[Child Protection Concern](#)

Requires Action By Me					
Actions	Pupil Name(s)	Raised By	Status	Heading	Action Required By
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	ALLAN Tom, ALTON Benjamin, BELL Edward, BURTON James, DAVIES John	STRINGER, Robert	Open	Fighting at Lunchtime	01/07/2016
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Page 1 of 1

1 - 4 of 4 items

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	ADAMS Sarah J	Open	Allegations of Stealing	08/07/2016 09:20:00
	ADAMS Lauren S, ADAMS Sarah J	Open	Playground chat	07/07/2016 15:35:00

[Search More Pastoral Records](#)

For more details, see:

- » "Configuring Pastoral Management" on page 58.
- » "Configuring GIRFEC" on page 72.

About GIRFEC

GIRFEC is the national approach in Scotland to improving outcomes and supporting the well being 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 is 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 management 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.

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 details, see ["Configuring GIRFEC" on page 72](#).

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 management record. For more information about creating categories, see ["Configuring Pastoral Management" on page 58](#).

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.

Pastoral Management
Add a Pastoral Record

[Pastoral Management Dashboard](#)

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...

Record Type(s): Antisocial Behav...

Staff Name: STRINGER, Robert

Date: 22/07/2016 10:19

Category: Critical

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.

Category: Critical

Heading: Aggressive Behaviour

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

Pupil Name(s): ADAMS, Lauren S x ADAMS, Sarah J x

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:

- » "Adding Pastoral Records" on the next page.
- » "Maintaining Pastoral Records" on page 30.

Adding Pastoral Records

You can add pastoral records relating to individual or groups of pupils about the same incident or concern using 3sysACADEMIC's **Pastoral Management** module.

After an initial Pastoral Management 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 and the **Pastoral Management** module helps you manage specific 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 specific deadline. A list of actions for each user to complete appears on their **Pastoral Management** dashboard, providing a convenient, single place where staff can see what they need to do.

Pastoral Management
Dashboard

Management
[Add Pastoral Record](#)
[Search](#)
Configuration
[Record Type](#)
[Category](#)
[GIRFEC](#)
Reports
[Child Protection Concern](#)

Requires Action By Me					
Actions	Pupil Name(s)	Raised By	Status	Heading	Action Required By
	DAVIS Laura, DAVIS Steven	STRINGER, Robert	Open	Davis Divorce	04/07/2016
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Page 1 of 1

1 - 4 of 4 items

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	ADAMS Lauren S, ADAMS Sarah J	Open	Playground chat	07/07/2016 15:35:00

[Search More Pastoral Records](#)

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 dashboard.

Pastoral Management
Dashboard

Management
[Add Pastoral Record](#)
[Search](#)
Configuration
[Record Type](#)
[Category](#)
[GIRFEC](#)
Reports
[Child Protection Concern](#)

Requires Action By Me					
Actions	Pupil Name(s)	Raised By	Status	Heading	Action Required By
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Page 1 of 1

1 - 4 of 4 items

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	ADAMS Lauren S, ADAMS Sarah J	Open	Playground chat	07/07/2016 15:35:00

[Search More Pastoral Records](#)

For more information, see:

- » "Adding Pastoral Records" below.
- » "Adding Pastoral Record Notes" on page 23.
- » "Maintaining Pastoral Records" on page 30.

These procedures incorporate the completion of GIRFEC information. (Applicable for Scottish schools only.) For details, see "About GIRFEC" on page 10.

Adding Pastoral Records

HOW TO ADD A PASTORAL RECORD

1. Do ONE of the following:
 - » Go to **Pastoral / Behaviour > Pastoral Management > Add Pastoral Record**.
 - » Go to **Pastoral / Behaviour > Pastoral Management** and click on **Add Pastoral Record** in the **Management** menu.

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

Pastoral Management
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):

Record Type(s):

Staff Name:

Date:

Category:

Status:

Headings:

Overview:

Make this Record Visible to All Staff: ☐

Make this Record Visible to Specific Staff/Roles:

Documents:

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

Save Cancel

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

Note: 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).

More details...

- » Click in the relevant **Pupil Name(s)** field and type the first letters of the item you require. Select your choice from the items that appear in the drop list. This is known as auto complete. Repeat this sequence until you have selected all the names you

require.

- » Click  at the end of the **Pupil Name(s)** field.
The **Pupil Search** dialog appears.

Pupil Search
✕

Group

Please Select ▼

Please Select ▼

Pupil Name

Search

Pupil Name	Pupil Code	Form	Pupil Name	Pupil Code	Form
------------	------------	------	------------	------------	------

OK

Cancel

a. Do one OR both of the following:

- » Use the two **Group** drop lists to refine your search. Your selection in the first drop list alters the options available in the second drop list.

Staff Search
✕

Group

Please Select ▼

Please Select ▼

Staff Type

Please Select ▼

Staff Name

Search

Staff Name	Staff Code	Staff Name	Staff Code
------------	------------	------------	------------

OK

Cancel

Example: In the example below, the user has selected 'Boarding House' using the first drop list, so the second drop list provides details of the school's boarding houses.

The screenshot shows the 'Pupil Search' window. The 'Group' dropdown is set to 'Boarding House'. A second dropdown menu is open, showing a list of boarding houses: Beech House, Blue house, Elm House, Green house, Lime House, Oak House, Red house, and Yellow house. The 'Pupil Name' field is empty, and the 'Search' button is visible.

» In the **Pupil Name** field, enter all or part of the name you want.

Example: In the example below, the user has selected to search by both boarding house ('Beech House') and part of the pupil name ('burgess').

The screenshot shows the 'Pupil Search' window. The 'Group' dropdown is set to 'Boarding House'. The second dropdown menu is set to 'Beech House'. The 'Pupil Name' field contains the text 'burgess'. The 'Search' button is visible.

b. Click **Search**.

A list of available pupils matching your search criteria appears on the left-hand side of the screen.

c. Click on each available pupil you want in the left-hand column.


Pupils move to the right-hand column once selected.

The screenshot shows the 'Pupil Search' window. The 'Group' dropdown is set to 'Form'. The second dropdown menu is set to 'Form 9A'. The 'Pupil Name' field is empty. The 'Search' button is visible. Below the search fields, there is a table with 13 results. The table has columns for Pupil Name, Pupil Code, and Form. The results are as follows:

Pupil Name	Pupil Code	Form
ASHFIELD, Gemma Frances	ASH003	09A
BRANGWEN, Ursula	BRA001	09A
BROOKS, Maria	BRO001	09A
GUTHRIE, Kate	GUT001	09A
HOLT, James	HOL001	09A
MITCHELL, Rebecca	MIT002	09A
NORGROVE, Mary	NOR001	09A

At the bottom of the window, it says '13 result(s)' and there are 'OK' and 'Cancel' buttons.



Note: To deselect a pupil, click on the  next to the relevant name or click on the name again to return it to the left-hand column.


- d. Repeat the search process until you have found and moved all the names you need into the right-hand column listing selected pupils. When you are finished, click **OK**.

You return to the previous screen with the pupil(s) added to the relevant field.

3. Add one or more options to the **Record Type(s)** field.

More details...

To select one or more record type, do ONE of the following:

- » Click in the **Record Type(s)** field and type the first letters of the record type you require. Select it from the options that appear in the drop list. This is known as auto complete.
- » Click  and the **Record Type Search** dialog appears.

Record Type Search
✕

Description

Search

Description	Description

OK
Cancel

- a. Type all or part of the relevant record type you want into the **Description** field OR leave it blank to return a complete list of available options.
- b. Click **Search**.
- c. Click on the record type(s) you want in the list that appears in the bottom left-hand column.

Selections move to the bottom right-hand column.

Record Type Search

Description

Search

Description	Description
Bereavement	Parents/Guardians Divorcing
Bullying	
Antisocial Behaviour	
Relocation	
Parents/Guardians Separating	

6 result(s)

OK Cancel

d. Click **OK**.

You are returned to the previous screen with the record type details added to the relevant field.

- Change the reporting member of staff, if required. (The logged in user appears automatically.)

More details...

Do ONE of the following:

- » Click in the relevant field and type all or part of the name you require. Select your choice from the items that appear in the drop list and it appears in the field. This is known as auto complete. For example:

Staff Name:

pa

DAVIS, Patrick M

PARKER, Lucy Ann

PARKER, Simon P

PARSONS, Albert Trevor

- » Click  at the end of the field to search for the required record. The **Staff Search** dialog appears.

- a. In the top part of the dialog, enter your search criteria and click **Search**.

You can filter by:

- » **Group** - From the first **Group** drop list, select the group type you want, e.g. 'Boarding House', 'Form' or 'Subject Set', and from the second **Group** drop list, select the person's specific group, e.g. 'Form 10A', 'English' etc.
- » **Staff Type** - From the **Staff Type** drop list, select the required type of staff, such as 'Academic', 'Non-Academic' or 'Both'.
- » **Name** - Type all or part of the staff member's name in the **Staff Name** field.




Note: To see a complete list of results, click **Search** WITHOUT entering any criteria.

- b. Click on the record you want. You are returned to the previous screen with the required staff record entered in the relevant field.

5. Amend the date and time, if required. (Today's date appears automatically.)

More details...

Do ONE of the following:

- » Type the required date and time in the field using the format DD/MM/YYYY and HH:MM.
- » Click  to display the **Calendar and Time** popup and select your preferred date and time. (To go to other months use the arrows in the top left and right-hand corners of the calendar. To see other times, use the arrows at the top and bottom on the right-

hand side.)

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

More details...

To select an item in a drop list, do ONE of the following:

- » Click and click on an option in the list that appears.
- » Click in the field and type all or part of the item you require. Select from the items that appear in the drop list. This is known as auto complete.



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

7. Type relevant information into the **Heading** and **Overview** fields.
8. Do ONE of the following:
- » Tick the check box to make the record visible to all staff.
 - » Add specific staff who can see the record to the **Make this Record Visible to Specific Staff/Roles** field.

More details...

- » Click in the relevant field and type the first letters of the item you require. Select your choice from the options that appear in the drop list. This is known as auto complete. Repeat this sequence until you have added all the names that you require.

- » Click at the end of the field to search for the required record. A **Staff Search** dialog appears.

Staff Search

Group

Please Select

Please Select

Staff Type

Please Select

Staff Name

Search

Staff Name	Staff Code	Staff Name	Staff Code

OK

Cancel

- a. In the top part of the dialog, enter your search criteria and click **Search**. You can filter by:

- » **Group** – From the first **Group** drop list, select the group type you want, e.g. boarding house, form or subject set, and from the second **Group** drop list, select the person's specific group, e.g. 10A, English etc. (If you do not wish to search by group, select 'None' in the first field.)
- » **Staff Type** – From the **Staff Type** drop list, select the required type of staff, such as 'Academic', 'Non-Academic' or 'Both'.
- » **Name** – Type in all or part of a staff member's name in the **Staff Name** field.

The results of your search appear in a list on the left-hand side of the dialog.

- b. Click on each record you want in the list of available options that appears in the bottom left-hand corner.

Staff names move from the left to the right-hand side of the screen once selected.

Staff Search

Group

Form Year

Year 3

Staff Type

Academic

Staff Name

Search

Staff Name	Staff Code	Staff Name	Staff Code
WATSON, Diana	DWJ	BAYTON, Elizabeth	EB
Head of Year	N/A	HILTON, John	HIL001
Form Tutor	N/A		
PIPER, Nigel E	NEP		

3 result(s)

OK Cancel



Note: To deselect staff, click on the next to the relevant name.

- c. (Optional) Repeat steps a to b to search for and add other staff members to the list of selected individuals on the right-hand side of the screen.
- d. When done, click **OK**.

You are returned to the previous screen with the required staff entered in the relevant field.

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 done, click **Save**.



Note: You **MUST** complete all compulsory fields before accessing the GIRFEC forms. GIRFEC options only appear if they are linked to the category selected.

Pastoral Management
 Add a Pastoral Record
 Pastoral Management Dashboard

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):

Record Type(s):

Staff Name:

Date:

Category:

Status:

Headings:

Overview:

Make this Record Visible to All Staff: ☒

GIRFEC Forms:

Documents:

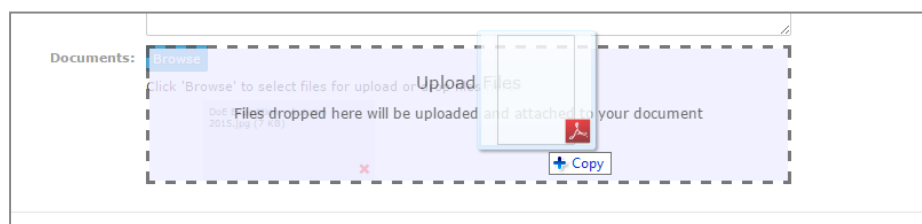
Click 'Browse' to select files for upload or drop files here.

10. (Optional) Attach related documents or evidence, such as statements and photographs.

More details...

Do ONE of the following:

- » Click **Browse** and find the file(s) you would like to add. Double-click on each file to add them one at a time OR hold the CTRL button down on your keyboard and click on each file once to select it, then click **Open** to add one or more simultaneously.
- » In another window, open the folder containing the file(s). Left-click once on the file's icon OR hold the CTRL button down on your keyboard and left-click on each file's icon if you want to add multiple documents. Hold the mouse button down and, without letting go, drag the file(s) towards the **Documents** section. An **Upload Files** dialog appears. Let go of the mouse button and a copy of the document(s) attach to the record. Repeat for each file(s) you would like to add.



Note: You can attach ANY file type to the record, including MP3s and film clips.

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

Pastoral Management
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): DAVIS, Laura x DAVIS, Steven x

Record Type(s): Parents/Guardia... x

Staff Name: STRINGER, Robert

Date: 22/07/2016 11:10

Category: High Priority

Status: Open

Headings: 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 (15 KB)

Save **Cancel**

11. Click **Save**.

The relevant **Edit 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: [dropdown]

Search **Add**

Child Protection Concern Form 1: [dropdown]

Child Protection Concern Form 2: [dropdown]

Wellbeing Concern Form 1: [dropdown]

Wellbeing Concern Form 2: [dropdown]

12. (Optional) Add notes to the record. For more information, see "[Adding Pastoral Record Notes](#)" below.

Adding Pastoral Record Notes

HOW TO ADD A PASTORAL RECORD NOTE

1. Find the pastoral record which requires a note.

More details...

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

The **Pastoral Record Search** screen appears.

Pastoral Management
Pastoral Record Search

[Pastoral Management Dashboard](#)

Pupil Name: Heading:
 Raised By: Status:
 Action Required: Date: -

[Search](#) [Reset](#)

[Add](#)

Actions	Pupil Name	Heading	Raised By	Status	Action Required	Date
	ADAMS Lauren S, ADAMS Sarah J	Playground chat	BRYANT, Melanie	Open	<input type="checkbox"/>	07/07/2016
	ADAMS Lauren S, ADAMS Sarah J	Returned Pupils	STRINGER, Robert	Open	<input type="checkbox"/>	18/04/2016
	ADAMS Lauren S, ADAMS Sarah J, ALEXANDER-GUTHERIDGE Rachel	CPC	BRYANT, Melanie	Open	<input type="checkbox"/>	12/07/2016
	ADAMS Sarah J	Allegations of Stealing	STRINGER, Robert	Open	<input checked="" type="checkbox"/>	08/07/2016
	ALLAN Tom, ALTON Benjamin, BELL Edward, BURTON James, DAVIES John	Fighting at Lunchtime	STRINGER, Robert	Open	<input checked="" type="checkbox"/>	24/06/2016

Page Size: 5 10 25 50 100 Records: 14



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

- b. Enter your search criteria in one or more of the fields at the top of the screen and click **Search**. Your results populate the grid. You can search by:

Field	Action
Pupil Name	Type all or part of a pupil's name into this field.
Heading	Type all or part of a heading into this field.
Raised By	Type all or part of a colleague's name into this field.
Status	Use this drop list to select the required option.
Action Required	Use this drop list to select 'Yes' or 'No'.
Date	Use these two fields to find records by when issues were reported. Put the same date in both fields to see records added on a single day OR different dates to see those logged in a set time period. Click in a field and type the required date OR click on it in the calendar that appears.



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

- c. (Optional) Use the **Page** icons beneath the grid to navigate between pages of results.
- » Click or or on the numbers underneath the grid on the left-hand side to move between pages.
 - » Click to go to the first page or to go to the last page.
 - » Use the **Page Size** options to see more records on each page.

Page Size: 5 10 25 50 100

- Click  next to the relevant record.

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



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

- (Optional) In the **Notes** section under the main record, use the **Pupil Name** drop list to select the pupil your note relates to.
- Click **Add** in the **Notes** section.

Further fields appear.

Notes

Pupil Name:

Child Protection Concern Form 1:

Child Protection Concern Form 2:

Wellbeing Concern Form 1:

Wellbeing Concern Form 2:

Search

Hide

Category:

Heading:

Note:

Pupil Name(s):

Make this Note Visible to All Staff: ☐

Make this Note Visible to Specific Staff/Roles:

Action Required: ☐

Documents:

Browse

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

Save



Note: To hide this section, click **Hide**.



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

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



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


- Type a heading for the note in the **Heading** field and more information in the **Note** field.
- (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.

8. Do ONE of the following:

- » Tick the check box to make the note visible to all staff.
- » Select specific staff who can see the record.

More details...

- » Click in the relevant field and type the first letters of the item you require. Select your choice from the options that appear in the drop list. This is known as auto complete. Repeat this sequence until you have added all the names that you require.

- » Click  at the end of the field to search for the required record. A **Staff Search** dialog appears.

- a. In the top part of the dialog, enter your search criteria and click **Search**. You can filter by:
 - » **Group** – From the first **Group** drop list, select the group type you want, e.g. boarding house, form or subject set, and from the second **Group** drop list, select the person's specific group, e.g. 10A, English etc. (If you do not wish to search by group, select 'None' in the first field.)
 - » **Staff Type** – From the **Staff Type** drop list, select the required type of staff, such as 'Academic', 'Non-Academic' or 'Both'.
 - » **Name** – Type in all or part of a staff member's name in the **Staff Name** field.

The results of your search appear in a list on the left-hand side of the dialog.

- b. Click on each record you want in the list of available options that appears in the bottom left-hand corner.

Staff names move from the left to the right-hand side of the screen once selected.

Staff Search

Group

Form Year

Year 3

Staff Type

Academic

Staff Name

Search

Staff Name	Staff Code	Staff Name	Staff Code
WATSON, Diana	DWJ	BAYTON, Elizabeth	EB
Head of Year	N/A	HILTON, John	HIL001
Form Tutor	N/A		
PIPER, Nigel E	NEP		

3 result(s)

OK Cancel



Note: To deselect staff, click on the next to the relevant name.

- c. (Optional) Repeat steps a to b to search for and add other staff members to the list of selected individuals on the right-hand side of the screen.
- d. When done, click **OK**.

You are returned to the previous screen with the required staff entered in the relevant field.

9. (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.

Action Required: ☒

Action Summary:

Action By Date: 23/07/2016 11:47


Action By:

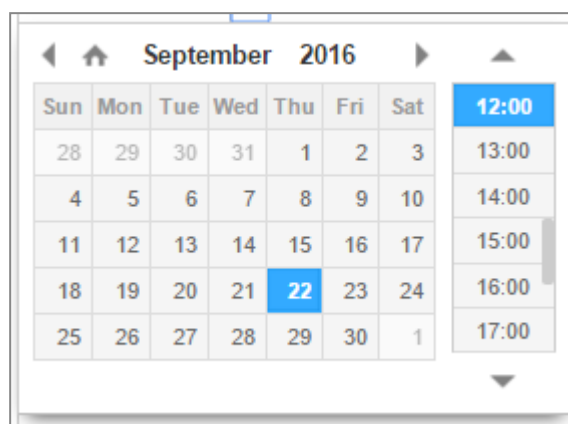
- b. Complete the **Action By Date** field.


More details...

Do ONE of the following:

- » Type the required date and time in the field using the format DD/MM/YYYY and HH:MM.

- » Click  to display the **Calendar and Time** popup and select your preferred date and time. (To go to other months use the arrows in the top left and right-hand corners of the calendar. To see other times, use the arrows at the top and bottom on the right-hand side.)



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

- c. Add each member of staff who should complete the action in the **Action By** field.



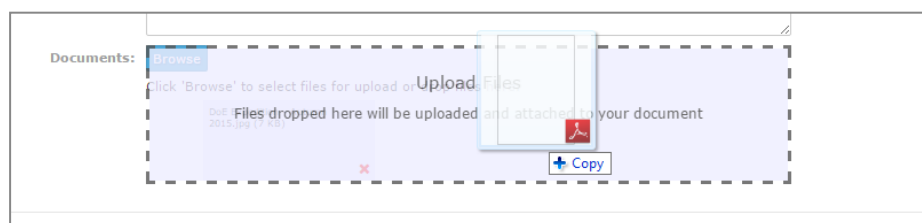
Note: Staff assigned actions MUST have been given access to 3sysACADEMIC by your System Administrator.

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 done, click **Save**.
11. (Optional) Attach related documents, such as reports, statements or correspondence.

More details...

Do ONE of the following:

- » Click **Browse** and find the file(s) you would like to add. Double-click on each file to add them one at a time OR hold the CTRL button down on your keyboard and click on each file once to select it, then click **Open** to add one or more simultaneously.
- » In another window, open the folder containing the file(s). Left-click once on the file's icon OR hold the CTRL button down on your keyboard and left-click on each file's icon if you want to add multiple documents. Hold the mouse button down and, without letting go, drag the file(s) towards the **Documents** section. An **Upload Files** dialog appears. Let go of the mouse button and a copy of the document(s) attach to the record. Repeat for each file(s) you would like to add.





Note: You can attach ANY file type to the record, including MP3s and film clips.

12. 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, Laura X DAVIS, Steven 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: 26/07/2016 09:00

Action By: STRINGER, Rob... X

Documents: [Browse](#)

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

[Save](#)

Maintaining Pastoral Records

The **Pastoral Management** module can be used to view, delete and make amendments and additions to pastoral records.



Note: 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 and the staff linked to the record's category. For more information about categories, see ["Configuring Pastoral Management" on page 58](#).

As well as being able to update records, users with appropriate access can augment them by adding **Notes** with further information or more recent developments. In addition, **Actions** can be added and assigned to staff as part of a note. See ["Adding Pastoral Record Notes" on page 23](#) for details.

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:

Search

Absence Arrangements

Action By: 04 July 2016 || STRINGER, Robert (30 June 2016)

Category:

Note: Mr and Mrs Davis wish to remove Steven and Laura from school for a few days next week (4 - 8/06/2016). 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:

Action By: STRINGER, Robert

Note Visible to Specific Staff: MCINTYRE, Janet Gillian
HARRIS, David Andrew
PARKER, Simon P
BOULDER, Brian James
STRINGER, Robert

Page Size: 5 10 25 50 100

Records: 1

The action deadline appears on the **Pastoral Management** dashboard 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 Management
Dashboard

Management
[Add Pastoral Record](#)
[Search](#)
Configuration
[Record Type](#)
[Category](#)
[GIRFEC](#)
Reports
[Child Protection Concern](#)

Requires Action By Me

Actions	Pupil Name(s)	Raised By	Status	Heading	Action Required By
	DAVIS Laura, DAVIS Steven	STRINGER, Robert	Open	Davis Divorce	04/07/2016
	CAVENDISH Mary, KERR Rebecca	STRINGER, Robert	Open	Allegation of Bullying	01/07/2016
	ALLAN Tom, ALTON Benjamin, BELL Edward, BURTON James, DAVIES John	STRINGER, Robert	Open	Fighting at Lunchtime	01/07/2016
	ADAMS Sarah J	STRINGER, Robert	Open	Allegations of Stealing	09/07/2016

Page 1 of 1 1 - 4 of 4 items

Recent Pastoral Records

Actions	Pupil Name(s)	Status	Heading	Date
	DAVIS Laura, DAVIS Steven	Open	Davis Divorce	22/07/2016 11:10:00
	ADAMS Lauren S, ADAMS Sarah J, ALEXANDER-GUTHERIDGE Rachel	Open	CPC	12/07/2016 10:31:00
	DUNCAN Katherine	Open	Unusual Behaviour	12/07/2016 09:31:00
	ADAMS Sarah J	Open	Allegations of Stealing	08/07/2016 09:20:00
	ADAMS Lauren S, ADAMS Sarah J	Open	Playground chat	07/07/2016 15:35:00

[Search More Pastoral Records](#)

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.

Absence Arrangements
Edit

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

For more information about how to complete Pastoral Management tasks, see:

- » "Viewing Pastoral Records" on the next page.
- » "Viewing GIRFEC Forms (Scottish Schools Only)" on page 35.
- » "Printing GIRFEC Forms (Scottish Schools Only)" on page 38.
- » "Editing Pastoral Records" on page 41 (including how to add GIRFEC forms).
- » "Editing Pastoral Record Notes" on page 44 (including how to edit GIRFEC forms).
- » "Marking Pastoral Record Actions 'Complete'" on page 47.
- » "Accessing the Child Protection Concern Report" on page 50.
- » "Deleting Pastoral Records" on page 53.



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

Viewing Pastoral Records

HOW TO VIEW A PASTORAL RECORD

- Find the pastoral record that you would like to view via ONE of the following:

» The **Pastoral Management** dashboard.


More details...

- Do ONE of the following:

- » Go to **Pastoral / Behaviour > Pastoral Management**.
- » Click **Pastoral Management Dashboard** on any Pastoral Management screen.









 **Pastoral Management Dashboard**

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


Pastoral Management
Dashboard











Management
[Add Pastoral Record](#)
[Search](#)
Configuration
[Record Type](#)
[Category](#)
[GIRFEC](#)
Reports
[Child Protection Concern](#)

Requires Action By Me

Actions	Pupil Name(s)	Raised By	Status	Heading	Action Required By
 	DAVIS Laura, DAVIS Steven	STRINGER, Robert	Open	Davis Divorce	04/07/2016
 	CAVENDISH Mary, KERR Rebecca	STRINGER, Robert	Open	Allegation of Bullying	01/07/2016
 	ALLAN Tom, ALTON Benjamin, BELL Edward, BURTON James, DAVIES John	STRINGER, Robert	Open	Fighting at Lunchtime	01/07/2016
 	ADAMS Sarah J	STRINGER, Robert	Open	Allegations of Stealing	09/07/2016



Page 1 of 1

Recent Pastoral Records





Actions	Pupil Name(s)	Status	Heading	Date
 	DAVIS Laura, DAVIS Steven	Open	Davis Divorce	22/07/2016 11:10:00
 	ADAMS Lauren S, ADAMS Sarah J, ALEXANDER-GUTHERIDGE Rachel	Open	CPC	12/07/2016 10:31:00
 	DUNCAN Katherine	Open	Unusual Behaviour	12/07/2016 09:31:00
 	ADAMS Sarah J	Open	Allegations of Stealing	08/07/2016 09:20:00
 	ADAMS Lauren S, ADAMS Sarah J	Open	Playground chat	07/07/2016 15:35:00

Search More Pastoral Records



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

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

- » Click  or  underneath the grid on the left-hand side to move between pages.
- » Click  to go to the first page or  to go to the last page.
- » Click in the **Page** field and type the number of the page you want.

Page of 1



» 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** and click **Search** in the **Management** menu.
 - » Go to **Pastoral / Behaviour > Pastoral Management** and click **Search More Pastoral Records** in the bottom right-hand corner of the **Pastoral Management** dashboard.

The **Pastoral Record Search** screen appears.



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





- b. Enter your search criteria in one or more of the fields at the top of the screen and click **Search**. Your results populate the grid. You can search by:

Field	Action
Pupil Name	Type all or part of a pupil's name into this field.
Heading	Type all or part of a heading into this field.
Raised By	Type all or part of a colleague's name into this field.
Status	Use this drop list to select the required option.
Action Required	Use this drop list to select 'Yes' or 'No'.
Date	Use these two fields to find records by when issues were reported. Put the same date in both fields to see records added on a single day OR different dates to see those logged in a set time period. Click in a field and type the required date OR click on it in the calendar that appears.



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

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

- » Click  or  or on the numbers underneath the grid on the left-hand side to move between pages.
- » Click  to go to the first page or  to go to the last page.
- » Use the **Page Size** options to see more records on each page.

Page Size:     

2. Click  next to the record you would like to see in more detail.

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

Example:

3. (Optional) Do ONE of the following:

- » Click **Edit** to amend the record. For more details, see ["Editing Pastoral Records" on page 41](#).
- » Click **Search** to leave the **View a Pastoral Record** screen and go to the **Pastoral Record Search** screen.
- » Click **Print Record** to open a **Print** dialog. Select a printer and click **Print** to print the record.

Viewing GIRFEC Forms (Scottish Schools Only)

HOW TO VIEW A GIRFEC FORM (SCOTTISH SCHOOLS ONLY)


- Find the pastoral record to which the GIRFEC form is attached via ONE of the following:
 - » The **Pastoral Management** dashboard.

More details...

- Do ONE of the following:
 - » Go to **Pastoral / Behaviour > Pastoral Management**.
 - » Click **Pastoral Management Dashboard** on any Pastoral Management screen.









 **Pastoral Management Dashboard**

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


Pastoral Management
Dashboard











Management
[Add Pastoral Record](#)
[Search](#)
Configuration
[Record Type](#)
[Category](#)
[GIRFEC](#)
Reports
[Child Protection Concern](#)

Requires Action By Me

Actions	Pupil Name(s)	Raised By	Status	Heading	Action Required By
 	DAVIS Laura, DAVIS Steven	STRINGER, Robert	Open	Davis Divorce	04/07/2016
 	CAVENDISH Mary, KERR Rebecca	STRINGER, Robert	Open	Allegation of Bullying	01/07/2016
 	ALLAN Tom, ALTON Benjamin, BELL Edward, BURTON James, DAVIES John	STRINGER, Robert	Open	Fighting at Lunchtime	01/07/2016
 	ADAMS Sarah J	STRINGER, Robert	Open	Allegations of Stealing	09/07/2016



Page 1 of 1





Recent Pastoral Records

Actions	Pupil Name(s)	Status	Heading	Date
 	DAVIS Laura, DAVIS Steven	Open	Davis Divorce	22/07/2016 11:10:00
 	ADAMS Lauren S, ADAMS Sarah J, ALEXANDER-GUTHERIDGE Rachel	Open	CPC	12/07/2016 10:31:00
 	DUNCAN Katherine	Open	Unusual Behaviour	12/07/2016 09:31:00
 	ADAMS Sarah J	Open	Allegations of Stealing	08/07/2016 09:20:00
 	ADAMS Lauren S, ADAMS Sarah J	Open	Playground chat	07/07/2016 15:35:00

Search More Pastoral Records



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

- (Optional) Use the icons beneath a grid to navigate between pages of records.
 - » Click  or  underneath the grid on the left-hand side to move between pages.
 - » Click  to go to the first page or  to go to the last page.
 - » Click in the **Page** field and type the number of the page you want.

Page 1 of 1

» 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** and click **Search** in the **Management** menu.
- » Go to **Pastoral / Behaviour > Pastoral Management** and click **Search More Pastoral Records** in the bottom right-hand corner of the **Pastoral Management** dashboard.

The **Pastoral Record Search** screen appears.

Actions	Pupil Name	Heading	Raised By	Status	Action Required	Date
	ADAMS Lauren S, ADAMS Sarah J	Playground chat	BRYANT, Melanie	Open	<input type="checkbox"/>	07/07/2016
	ADAMS Lauren S, ADAMS Sarah J	Returned Pupils	STRINGER, Robert	Open	<input type="checkbox"/>	18/04/2016
	ADAMS Lauren S, ADAMS Sarah J, ALEXANDER-GUTHERIDGE Rachel	CPC	BRYANT, Melanie	Open	<input type="checkbox"/>	12/07/2016
	ADAMS Sarah J	Allegations of Stealing	STRINGER, Robert	Open	<input checked="" type="checkbox"/>	08/07/2016
	ALLAN Tom, ALTON Benjamin, BELL Edward, BURTON James, DAVIES John	Fighting at Lunchtime	STRINGER, Robert	Open	<input checked="" type="checkbox"/>	24/06/2016



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





b. Enter your search criteria in one or more of the fields at the top of the screen and click **Search**. Your results populate the grid. You can search by:

Field	Action
Pupil Name	Type all or part of a pupil's name into this field.
Heading	Type all or part of a heading into this field.
Raised By	Type all or part of a colleague's name into this field.
Status	Use this drop list to select the required option.
Action Required	Use this drop list to select 'Yes' or 'No'.
Date	Use these two fields to find records by when issues were reported. Put the same date in both fields to see records added on a single day OR different dates to see those logged in a set time period. Click in a field and type the required date OR click on it in the calendar that appears.



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

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

- » Click  or  or on the numbers underneath the grid on the left-hand side to move between pages.
- » Click  to go to the first page or  to go to the last page.
- » Use the **Page Size** options to see more records on each page.

Page Size:     

2. Click  next to the relevant record.

The required **View a Pastoral Record** screen appears.

3. 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.

4. 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**
 - ▼ **DUNCAN, Katherine**

 CPC1 Version 1 12/07/2016 09:36
- ▶ **Child Protection Concern Form 2**
- ▶ **Wellbeing Concern Form 1**
- ▶ **Wellbeing Concern Form 2**

5. Click  next to the relevant form.

The selected form appears.

6. When you have finished viewing the record, do ONE of the following:

- » Click **Cancel** to go to the record's **Edit a Pastoral Management** screen.
- » Click **Pastoral Management Dashboard** to go to the module's dashboard.

Printing GIRFEC Forms (Scottish Schools Only)

HOW TO PRINT A GIRFEC FORM (SCOTTISH SCHOOLS ONLY)

- Find the pastoral record associated with the GIRFEC form you want to print via ONE of the following:

» The **Pastoral Management** dashboard.


More details...

- Do ONE of the following:

- » Go to **Pastoral / Behaviour > Pastoral Management**.
- » Click **Pastoral Management Dashboard** on any Pastoral Management screen.

Pastoral Management Dashboard

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



Pastoral Management Dashboard

Management

Add Pastoral Record

Search

Configuration

Record Type

Category

GIRFEC

Reports

Child Protection Concern

Requires Action By Me

Actions	Pupil Name(s)	Raised By	Status	Heading	Action Required By
<div><div>Q</div><div>✎</div><div>⌵</div></div>	DAVIS Laura, DAVIS Steven	STRINGER, Robert	Open	Davis Divorce	04/07/2016
<div><div>Q</div><div>✎</div><div>⌵</div></div>	CAVENDISH Mary, KERR Rebecca	STRINGER, Robert	Open	Allegation of Bullying	01/07/2016
<div><div>Q</div><div>✎</div><div>⌵</div></div>	ALLAN Tom, ALTON Benjamin, BELL Edward, BURTON James, DAVIES John	STRINGER, Robert	Open	Fighting at Lunchtime	01/07/2016
<div><div>Q</div><div>✎</div><div>⌵</div></div>	ADAMS Sarah J	STRINGER, Robert	Open	Allegations of Stealing	09/07/2016

1

Page 1 of 1

1 - 4 of 4 items

Recent Pastoral Records

Actions	Pupil Name(s)	Status	Heading	Date
<div><div>Q</div><div>✎</div><div>⌵</div></div>	DAVIS Laura, DAVIS Steven	Open	Davis Divorce	22/07/2016 11:10:00
<div><div>Q</div><div>✎</div><div>⌵</div></div>	ADAMS Lauren S, ADAMS Sarah J, ALEXANDER-GUTHERIDGE Rachel	Open	CPC	12/07/2016 10:31:00
<div><div>Q</div><div>✎</div><div>⌵</div></div>	DUNCAN Katherine	Open	Unusual Behaviour	12/07/2016 09:31:00
<div><div>Q</div><div>✎</div><div>⌵</div></div>	ADAMS Sarah J	Open	Allegations of Stealing	08/07/2016 09:20:00
<div><div>Q</div><div>✎</div><div>⌵</div></div>	ADAMS Lauren S, ADAMS Sarah J	Open	Playground chat	07/07/2016 15:35:00

1

Search More Pastoral Records



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

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

- » Click or underneath the grid on the left-hand side to move between pages.
- » Click to go to the first page or to go to the last page.
- » Click in the **Page** field and type the number of the page you want.

Page of 1

» 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** and click **Search** in the **Management** menu.
 - » Go to **Pastoral / Behaviour > Pastoral Management** and click **Search More Pastoral Records** in the bottom right-hand corner of the **Pastoral Management** dashboard.

The **Pastoral Record Search** screen appears.

Actions	Pupil Name	Heading	Raised By	Status	Action Required	Date
	ADAMS Lauren S, ADAMS Sarah J	Playground chat	BRYANT, Melanie	Open	<input type="checkbox"/>	07/07/2016
	ADAMS Lauren S, ADAMS Sarah J	Returned Pupils	STRINGER, Robert	Open	<input type="checkbox"/>	18/04/2016
	ADAMS Lauren S, ADAMS Sarah J, ALEXANDER-GUTHERIDGE Rachel	CPC	BRYANT, Melanie	Open	<input type="checkbox"/>	12/07/2016
	ADAMS Sarah J	Allegations of Stealing	STRINGER, Robert	Open	<input checked="" type="checkbox"/>	08/07/2016
	ALLAN Tom, ALTON Benjamin, BELL Edward, BURTON James, DAVIES John	Fighting at Lunchtime	STRINGER, Robert	Open	<input checked="" type="checkbox"/>	24/06/2016



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





- b. Enter your search criteria in one or more of the fields at the top of the screen and click **Search**. Your results populate the grid. You can search by:

Field	Action
Pupil Name	Type all or part of a pupil's name into this field.
Heading	Type all or part of a heading into this field.
Raised By	Type all or part of a colleague's name into this field.
Status	Use this drop list to select the required option.
Action Required	Use this drop list to select 'Yes' or 'No'.
Date	Use these two fields to find records by when issues were reported. Put the same date in both fields to see records added on a single day OR different dates to see those logged in a set time period. Click in a field and type the required date OR click on it in the calendar that appears.



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

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

- » Click  or  or on the numbers underneath the grid on the left-hand side to move between pages.
- » Click  to go to the first page or  to go to the last page.
- » Use the **Page Size** options to see more records on each page.

Page Size:     

2. Click  next to the relevant record.

The required **View a Pastoral Record** screen appears.

3. 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.

4. 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**
 - ▼ **DUNCAN, Katherine**

  CPC1 Version 1 12/07/2016 09:36
- ▶ **Child Protection Concern Form 2**
- ▶ **Wellbeing Concern Form 1**
- ▶ **Wellbeing Concern Form 2**

5. Click  next to the relevant form.

A print friendly version of the form appears and the **Print** dialog opens.

6. Select the relevant printer and click **Print**.

» 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** and click **Search** in the **Management** menu.
- » Go to **Pastoral / Behaviour > Pastoral Management** and click **Search More Pastoral Records** in the bottom right-hand corner of the **Pastoral Management** dashboard.

The **Pastoral Record Search** screen appears.

Actions	Pupil Name	Heading	Raised By	Status	Action Required	Date
	ADAMS Lauren S, ADAMS Sarah J	Playground chat	BRYANT, Melanie	Open	<input type="checkbox"/>	07/07/2016
	ADAMS Lauren S, ADAMS Sarah J	Returned Pupils	STRINGER, Robert	Open	<input type="checkbox"/>	18/04/2016
	ADAMS Lauren S, ADAMS Sarah J, ALEXANDER-GUTHERIDGE Rachel	CPC	BRYANT, Melanie	Open	<input type="checkbox"/>	12/07/2016
	ADAMS Sarah J	Allegations of Stealing	STRINGER, Robert	Open	<input checked="" type="checkbox"/>	08/07/2016
	ALLAN Tom, ALTON Benjamin, BELL Edward, BURTON James, DAVIES John	Fighting at Lunchtime	STRINGER, Robert	Open	<input checked="" type="checkbox"/>	24/06/2016



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

b. Enter your search criteria in one or more of the fields at the top of the screen and click **Search**. Your results populate the grid. You can search by:

Field	Action
Pupil Name	Type all or part of a pupil's name into this field.
Heading	Type all or part of a heading into this field.
Raised By	Type all or part of a colleague's name into this field.
Status	Use this drop list to select the required option.
Action Required	Use this drop list to select 'Yes' or 'No'.
Date	Use these two fields to find records by when issues were reported. Put the same date in both fields to see records added on a single day OR different dates to see those logged in a set time period. Click in a field and type the required date OR click on it in the calendar that appears.



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

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

- » Click or or on the numbers underneath the grid on the left-hand side to move between pages.
- » Click to go to the first page or to go to the last page.
- » Use the **Page Size** options to see more records on each page.

Page Size:

2. Click next to the record you would like to edit.

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

Pastoral Management
Edit a Pastoral Record

Pastoral Management Dashboard

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): ASLETT, Fletcher

Record Type(s): Relocation

Staff Name: STRINGER, Robert

Date: 18/01/2016 10:31

Show Alert Against Pupil: ☒

Status: Open

Category: Medium Priority

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:

Save Cancel Print Record

Notes Add Search

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

3. Make your changes to the following fields, as required:

- » **Status**
- » **Make this Record Visible to All Staff / Make this Record Visible to Specific Staff**
- » **GIRFEC Forms** - Scottish schools only. If forms were not completed when the record was added, it is possible to do so subsequently.



Note: Security relating to pastoral management records means that you may only edit certain fields.

4. Click **Save**.

Editing Pastoral Record Notes

HOW TO EDIT A PASTORAL RECORD NOTE

1. Find the record to which the note is attached via ONE of the following:

- » The **Pastoral Management** dashboard.

More details...

- a. Do ONE of the following:

- » Go to **Pastoral / Behaviour > Pastoral Management**.
- » Click **Pastoral Management Dashboard** on any Pastoral Management screen.

Pastoral Management Dashboard

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

Pastoral Management Dashboard

Management

Add Pastoral Record

Search

Configuration

Record Type

Category

GIRFEC

Reports

Child Protection Concern

Requires Action By Me

Actions	Pupil Name(s)	Raised By	Status	Heading	Action Required By
<div><div></div><div></div><div></div></div>	DAVIS Laura, DAVIS Steven	STRINGER, Robert	Open	Davis Divorce	04/07/2016
<div><div></div><div></div><div></div></div>	CAVENISH Mary, KERR Rebecca	STRINGER, Robert	Open	Allegation of Bullying	01/07/2016
<div><div></div><div></div><div></div></div>	ALLAN Tom, ALTON Benjamin, BELL Edward, BURTON James, DAVIES John	STRINGER, Robert	Open	Fighting at Lunchtime	01/07/2016
<div><div></div><div></div><div></div></div>	ADAMS Sarah J	STRINGER, Robert	Open	Allegations of Stealing	09/07/2016

1

Page 1 of 1

Recent Pastoral Records

Actions	Pupil Name(s)	Status	Heading	Date
<div><div></div><div></div><div></div></div>	DAVIS Laura, DAVIS Steven	Open	Davis Divorce	22/07/2016 11:10:00
<div><div></div><div></div><div></div></div>	ADAMS Lauren S, ADAMS Sarah J, ALEXANDER-GUTHERIDGE Rachel	Open	CPC	12/07/2016 10:31:00
<div><div></div><div></div><div></div></div>	DUNCAN Katherine	Open	Unusual Behaviour	12/07/2016 09:31:00
<div><div></div><div></div><div></div></div>	ADAMS Sarah J	Open	Allegations of Stealing	08/07/2016 09:20:00
<div><div></div><div></div><div></div></div>	ADAMS Lauren S, ADAMS Sarah J	Open	Playground chat	07/07/2016 15:35:00

Search More Pastoral Records



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

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

- » Click or underneath the grid on the left-hand side to move between pages.
- » Click to go to the first page or to go to the last page.
- » Click in the **Page** field and type the number of the page you want.

Page of 1

» 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** and click **Search** in the **Management** menu.
 - » Go to **Pastoral / Behaviour > Pastoral Management** and click **Search More Pastoral Records** in the bottom right-hand corner of the **Pastoral Management** dashboard.

The **Pastoral Record Search** screen appears.

Actions	Pupil Name	Heading	Raised By	Status	Action Required	Date
	ADAMS Lauren S, ADAMS Sarah J	Playground chat	BRYANT, Melanie	Open	<input type="checkbox"/>	07/07/2016
	ADAMS Lauren S, ADAMS Sarah J	Returned Pupils	STRINGER, Robert	Open	<input type="checkbox"/>	18/04/2016
	ADAMS Lauren S, ADAMS Sarah J, ALEXANDER-GUTHERIDGE Rachel	CPC	BRYANT, Melanie	Open	<input type="checkbox"/>	12/07/2016
	ADAMS Sarah J	Allegations of Stealing	STRINGER, Robert	Open	<input checked="" type="checkbox"/>	08/07/2016
	ALLAN Tom, ALTON Benjamin, BELL Edward, BURTON James, DAVIES John	Fighting at Lunchtime	STRINGER, Robert	Open	<input checked="" type="checkbox"/>	24/06/2016



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





- b. Enter your search criteria in one or more of the fields at the top of the screen and click **Search**. Your results populate the grid. You can search by:

Field	Action
Pupil Name	Type all or part of a pupil's name into this field.
Heading	Type all or part of a heading into this field.
Raised By	Type all or part of a colleague's name into this field.
Status	Use this drop list to select the required option.
Action Required	Use this drop list to select 'Yes' or 'No'.
Date	Use these two fields to find records by when issues were reported. Put the same date in both fields to see records added on a single day OR different dates to see those logged in a set time period. Click in a field and type the required date OR click on it in the calendar that appears.




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

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


- » Click  or  or on the numbers underneath the grid on the left-hand side to move between pages.
- » Click  to go to the first page or  to go to the last page.
- » Use the **Page Size** options to see more records on each page.


Page Size:     

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

More details...

- a. Scroll down the **Edit a Pastoral Record** 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.

- c. Click **Search**.
The results appear below.
4. Click **Edit** next to the heading of the note you would like to amend.
5. Make your changes to the available fields, as required. They may include:
 - » **Action Summary**
 - » **Action Note**
 - » **Action By**
 - » **Make this Note Visible to All Staff / Make this Note Visible to Specific Staff**
 - » **Documents**
 - » **GIRFEC Forms** - Scottish schools only. If a note has an action associated with it, users can create updated forms. Click  next to the form you want to amend.



Note: Security relating to pastoral management records means that you may only edit certain fields. If the note does NOT require action, only its visibility can be changed. If action IS required, more details can be updated.

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 ONE of the following:
 - » The **Pastoral Management** dashboard.

More details...

- a. Do ONE of the following:
 - » Go to **Pastoral / Behaviour > Pastoral Management**.
 - » Click **Pastoral Management Dashboard** on any Pastoral Management screen.

 **Pastoral Management Dashboard**

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



Pastoral Management Dashboard

Management

Add Pastoral Record

Search

Configuration

Record Type









Category


GIRFEC

Reports


Child Protection Concern

Requires Action By Me

Actions	Pupil Name(s)	Raised By	Status	Heading	Action Required By
<div><div></div><div></div></div>	DAVIS Laura, DAVIS Steven	STRINGER, Robert	Open	Davis Divorce	04/07/2016
<div><div></div><div></div></div>	CAVENDISH Mary, KERR Rebecca	STRINGER, Robert	Open	Allegation of Bullying	01/07/2016
<div><div></div><div></div></div>	ALLAN Tom, ALTON Benjamin, BELL Edward, BURTON James, DAVIES John	STRINGER, Robert	Open	Fighting at Lunchtime	01/07/2016
<div><div></div><div></div></div>	ADAMS Sarah J	STRINGER, Robert	Open	Allegations of Stealing	09/07/2016













1



Page 1 of 1



1 - 4 of 4 items





Recent Pastoral Records

Actions	Pupil Name(s)	Status	Heading	Date
<div><div></div><div></div></div>	DAVIS Laura, DAVIS Steven	Open	Davis Divorce	22/07/2016 11:10:00
<div><div></div><div></div></div>	ADAMS Lauren S, ADAMS Sarah J, ALEXANDER-GUTHERIDGE Rachel	Open	CPC	12/07/2016 10:31:00
<div><div></div><div></div></div>	DUNCAN Katherine	Open	Unusual Behaviour	12/07/2016 09:31:00
<div><div></div><div></div></div>	ADAMS Sarah J	Open	Allegations of Stealing	08/07/2016 09:20:00
<div><div></div><div></div></div>	ADAMS Lauren S, ADAMS Sarah J	Open	Playground chat	07/07/2016 15:35:00

Search More Pastoral Records



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- b. (Optional) Use the icons beneath a grid to navigate between pages of records.
 - » Click  or  underneath the grid on the left-hand side to move between pages.
 - » Click  to go to the first page or  to go to the last page.
 - » Click in the **Page** field and type the number of the page you want.

Page of 1

» 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** and click **Search** in the **Management** menu.
- » Go to **Pastoral / Behaviour > Pastoral Management** and click **Search More Pastoral Records** in the bottom right-hand corner of the **Pastoral Management** dashboard.

The **Pastoral Record Search** screen appears.

Actions	Pupil Name	Heading	Raised By	Status	Action Required	Date
	ADAMS Lauren S, ADAMS Sarah J	Playground chat	BRYANT, Melanie	Open	<input type="checkbox"/>	07/07/2016
	ADAMS Lauren S, ADAMS Sarah J	Returned Pupils	STRINGER, Robert	Open	<input type="checkbox"/>	18/04/2016
	ADAMS Lauren S, ADAMS Sarah J, ALEXANDER-GUTHERIDGE Rachel	CPC	BRYANT, Melanie	Open	<input type="checkbox"/>	12/07/2016
	ADAMS Sarah J	Allegations of Stealing	STRINGER, Robert	Open	<input checked="" type="checkbox"/>	08/07/2016
	ALLAN Tom, ALTON Benjamin, BELL Edward, BURTON James, DAVIES John	Fighting at Lunchtime	STRINGER, Robert	Open	<input checked="" type="checkbox"/>	24/06/2016



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

b. Enter your search criteria in one or more of the fields at the top of the screen and click **Search**. Your results populate the grid. You can search by:

Field	Action
Pupil Name	Type all or part of a pupil's name into this field.
Heading	Type all or part of a heading into this field.
Raised By	Type all or part of a colleague's name into this field.
Status	Use this drop list to select the required option.
Action Required	Use this drop list to select 'Yes' or 'No'.
Date	Use these two fields to find records by when issues were reported. Put the same date in both fields to see records added on a single day OR different dates to see those logged in a set time period. Click in a field and type the required date OR click on it in the calendar that appears.



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

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

- » Click or or on the numbers underneath the grid on the left-hand side to move between pages.
- » Click to go to the first page or to go to the last page.
- » Use the **Page Size** options to see more records on each page.

Page Size:

2. Click next to the relevant record.

Pastoral Management
Pastoral Record Search

Pastoral Management Dashboard

Pupil Name:
Raised By:
Action Required:

Heading:
Status:
Date: -

Actions	Pupil Name	Heading	Raised By	Status	Action Required	Date
	ADAMS Lauren S, ADAMS Sarah J	Playground chat	BRYANT, Melanie	Open	<input type="checkbox"/>	07/07/2016
	ADAMS Lauren S, ADAMS Sarah J	Returned Pupils	STRINGER, Robert	Open	<input type="checkbox"/>	18/04/2016
	ADAMS Lauren S, ADAMS Sarah J, ALEXANDER-GUTHERIDGE Rachel	CPC	BRYANT, Melanie	Open	<input type="checkbox"/>	12/07/2016
	ADAMS Sarah J	Allegations of Stealing	STRINGER, Robert	Open	<input checked="" type="checkbox"/>	08/07/2016
	ALLAN Tom, ALTON Benjamin, BELL Edward, BURTON James, DAVIES John	Fighting at Lunchtime	STRINGER, Robert	Open	<input checked="" type="checkbox"/>	24/06/2016

Page Size:
Records: 14

3. Find the note to which the action relates.

More details...

- a. Scroll down the **Edit a Pastoral Record** 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.

- c. Click **Search**.

The results appear below.

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: 26 July 2016 || 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.

Action By: STRINGER, Robert

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

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

[Edit](#)

☒

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

Accessing the Child Protection Concern Report

HOW TO ACCESS THE CHILD PROTECTION CONCERN REPORT

1. Go to [Pastoral / Behaviour > Reports > Child Protection Concern](#).

Pastoral / Behaviour
Academic Management
Staff
Calendar

Pastoral Management

Add Pastoral Record


Search


Pupil Events


Reports


Child Protection Concern

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

<div>  Pastoral Management Child Protection Concern Report </div> <div>Pastoral Management Dashboard</div>									
<p>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.</p>									
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"/>





1 Page 1 of 1


20 items per page
1 - 3 of 3 items




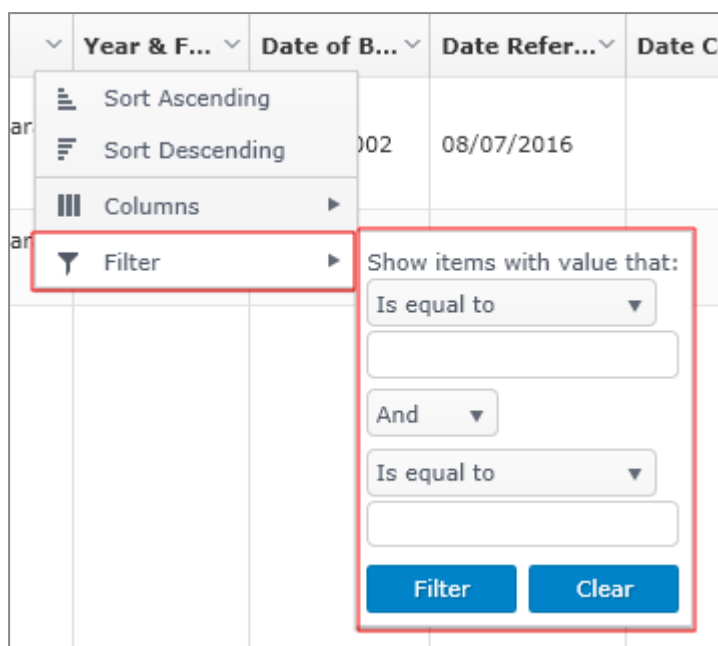
Note: The options you see depend upon the permissions set by your System Administrator.

- (Optional) Sort the data by a particular column by clicking  next to the relevant column heading and selecting 'Sort Ascending' or 'Sort Descending'.
- Show or hide columns as required by clicking any  and 'Columns'. Tick the check boxes for each column that should be visible.



▼	Year & F... ▼	Date of B... ▼	Date Refer... ▼	Date Concern P
Sort Ascending				
Sort Descending				
Columns				
Filter				

☒ Name
☒ Year & Form
☒ Date of Birth
☒ Date Referred
☒ Date Concern Passed On
☒ Reason Not Passed On
☒ IRD
☒ CPCC
☒ CPCC Date
☒ Placed On Register
☒ Date Removed From Register





- Filter the data by clicking  in the relevant header(s) and 'Filter' to adjust the relevant options, as required.



More details...

- a. Click  next to the heading you would like to filter by and click **Filter** in the menu that appears.
 - 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**.
 - f. To clear a filter, click **Clear**.
5. (Optional) Click  above the **Child Protection Concern Report** grid to export the data to MS Excel.

More details...

- a. Click .
- b. Do ONE of the following:
 - » Click **Open** to open the spreadsheet.
 - » Click **Save** to save the file to your computer and **Open** to see it once it has been downloaded.
 - » Click  and **Save as** to save the spreadsheet in your preferred location.
 - » Click  and **Save and open** to save and automatically open the file.
 - » Click **Cancel** or  to abort the export.

» 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** and click **Search** in the **Management** menu.
- » Go to **Pastoral / Behaviour > Pastoral Management** and click **Search More Pastoral Records** in the bottom right-hand corner of the **Pastoral Management** dashboard.

The **Pastoral Record Search** screen appears.

Actions	Pupil Name	Heading	Raised By	Status	Action Required	Date
	ADAMS Lauren S, ADAMS Sarah J	Playground chat	BRYANT, Melanie	Open	<input type="checkbox"/>	07/07/2016
	ADAMS Lauren S, ADAMS Sarah J	Returned Pupils	STRINGER, Robert	Open	<input type="checkbox"/>	18/04/2016
	ADAMS Lauren S, ADAMS Sarah J, ALEXANDER-GUTHERIDGE Rachel	CPC	BRYANT, Melanie	Open	<input type="checkbox"/>	12/07/2016
	ADAMS Sarah J	Allegations of Stealing	STRINGER, Robert	Open	<input checked="" type="checkbox"/>	08/07/2016
	ALLAN Tom, ALTON Benjamin, BELL Edward, BURTON James, DAVIES John	Fighting at Lunchtime	STRINGER, Robert	Open	<input checked="" type="checkbox"/>	24/06/2016



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





b. Enter your search criteria in one or more of the fields at the top of the screen and click **Search**. Your results populate the grid. You can search by:

Field	Action
Pupil Name	Type all or part of a pupil's name into this field.
Heading	Type all or part of a heading into this field.
Raised By	Type all or part of a colleague's name into this field.
Status	Use this drop list to select the required option.
Action Required	Use this drop list to select 'Yes' or 'No'.
Date	Use these two fields to find records by when issues were reported. Put the same date in both fields to see records added on a single day OR different dates to see those logged in a set time period. Click in a field and type the required date OR click on it in the calendar that appears.



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

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

- » Click  or  or on the numbers underneath the grid on the left-hand side to move between pages.
- » Click  to go to the first page or  to go to the last page.
- » Use the **Page Size** options to see more records on each page.

Page Size:     

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



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

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



3. Click **Delete**.

The **Pastoral Record Search** screen appears with the record removed from the grid.

This page has been left blank intentionally.

CHAPTER 3

Configuring Pastoral Management

This chapter discusses the following:

Configuring Pastoral Management	58
Setting up Record Types	58
Editing Record Types	59
Deleting Record Types	60
Setting up Categories	61
Viewing Categories	65
Editing Categories	66
Deleting Categories	67
Allocating Access to Pastoral Management	69
Configuring GIRFEC	72
Activating GIRFEC Options (Scottish Schools Only)	72
Allocating Access to the Child Protection Concern Report (Scottish Schools Only)	72

Configuring Pastoral Management

Using the **Pastoral Management** module, you can create and maintain the categories and record types used when recording pastoral issues.

Categories help organisations to manage staff access to pastoral records, providing a quick and simple way to ensure that only the appropriate members of staff can see sensitive information, where required. Alternatively, users can make records visible to all staff with access to the module.

GIRFEC forms required in Scotland are also associated with specific pastoral record categories. Selecting the appropriate category immediately links the record with the required GIRFEC forms.

Pastoral record types allow schools to group records by theme, depending upon the organisation's particular preference.

To use the **Pastoral Management** module effectively, your System Administrator must configure and manage the categories and record types to best suit your school's needs. As such, users are able to:

- » Set up record types - See ["Setting up Record Types" below](#).
- » Edit record types - See ["Editing Record Types" on the facing page](#).
- » Delete record types - See ["Deleting Record Types" on page 60](#).
- » Set up categories - See ["Setting up Categories" on page 61](#).
- » View categories - See ["Viewing Categories" on page 65](#).
- » Edit categories - See ["Editing Categories" on page 66](#).
- » Delete categories - See ["Deleting Categories" on page 67](#).

This section also describes how System Administrators can allocate user access to the **Pastoral Management** module. For details, see ["Allocating Access to Pastoral Management" on page 69](#).



Note: Normally, pastoral record types and categories are configured by your System Administrator. As such, you may not be able to see this section when you log in.

Setting up Record Types

HOW TO SET UP A RECORD TYPE

1. Go to [Pastoral / Behaviour > Pastoral Management](#) and click **Record Type** in the **Configuration** menu.

The **Setup: View Pastoral Record Types** screen appears.

Pastoral Management
 Setup: View Pastoral Record Types

[Pastoral Management Dashboard](#)

[Edit](#)
[Search](#)

Show Hidden ☐

In Use	Description
<input checked="" type="checkbox"/>	Parents/Guardians Divorcing
<input checked="" type="checkbox"/>	Bereavement
<input checked="" type="checkbox"/>	Bullying
<input checked="" type="checkbox"/>	Antisocial Behaviour
<input checked="" type="checkbox"/>	Relocation

[Edit](#)
[Search](#)

2. Click **Edit**.

- Click in the empty **Description** field in the bottom row and type the name of the new pastoral record type.

Pastoral Management
Setup: Pastoral Record Types

[Pastoral Management Dashboard](#)

Pastoral record types setup creates the reason types for a pastoral record, e.g. illness, bereavement or problems at home etc.

[Save](#) [Cancel](#)

Show Hidden ☐

	In Use	Description
<input type="radio"/>	<input checked="" type="checkbox"/>	Parents/Guardians Divorcing
<input type="radio"/>	<input checked="" type="checkbox"/>	Bereavement
<input type="radio"/>	<input checked="" type="checkbox"/>	Bullying
<input type="radio"/>	<input checked="" type="checkbox"/>	Antisocial Behaviour
<input type="radio"/>	<input checked="" type="checkbox"/>	Relocation
<input checked="" type="radio"/>	<input checked="" type="checkbox"/>	



Note: The colour of the dot in the first column denotes the status of the row. For more information, see the Getting Started User Guide.

- In the same row, tick the **In Use** check box to make the new pastoral record type live and available for others to use.
- Click **Save**.

Editing Record Types

HOW TO EDIT A RECORD TYPE

- Find the record type that you would like to edit.

More details...

- Go to **Pastoral / Behaviour > Pastoral Management** and click **Record Type** in the **Configuration** menu.

The **Setup: View Pastoral Record Types** screen appears.

Pastoral Management
Setup: View Pastoral Record Types

[Pastoral Management Dashboard](#)

[Edit](#) [Search](#)

Show Hidden ☐

In Use	Description
<input checked="" type="checkbox"/>	Parents/Guardians Divorcing
<input checked="" type="checkbox"/>	Bereavement
<input checked="" type="checkbox"/>	Bullying
<input checked="" type="checkbox"/>	Antisocial Behaviour
<input checked="" type="checkbox"/>	Relocation

[Edit](#) [Search](#)

- (Optional) Check the **Show Hidden** check box to show a complete list of pastoral record types, including those that are not currently in use.
- Click **Edit**.
 - Make the required changes.



Note: The colour of the dot in the first column denotes the status of the row. For more information, see the Getting Started User Guide.

4. (Optional) If you make a change in error, you can click the adjacent to undo it.



Note: You CANNOT undo changes once you have clicked **Save**. Instead, you must edit the pastoral record type.

5. Click **Save**.
6. (Optional) To make further amendments, click **Edit** and repeat steps 2 to 4.

Deleting Record Types

HOW TO DELETE A RECORD TYPE

1. Find the record type you would like to delete.

More details...

- a. Go to **Pastoral / Behaviour > Pastoral Management** and click **Record Type** in the **Configuration** menu.

The **Setup: View Pastoral Record Types** screen appears.

In Use	Description
<input checked="" type="checkbox"/>	Parents/Guardians Divorcing
<input checked="" type="checkbox"/>	Bereavement
<input checked="" type="checkbox"/>	Bullying
<input checked="" type="checkbox"/>	Antisocial Behaviour
<input checked="" type="checkbox"/>	Relocation

- b. (Optional) Check the **Show Hidden** check box to show a complete list of pastoral record types, including those that are not currently in use.
2. Click **Edit**.
3. Click next to the category you would like to delete.
A red line strikes through the row you are deleting.



Note: You can reverse a deletion by clicking the adjacent . You CANNOT undo a deletion once you have clicked **Save**.



Note: The colour of the dot in the first column denotes the status of the row. For more information, see the Getting Started User Guide.

4. Click **Save**.

Note: You cannot delete a pastoral record type that is already associated with a record.

Pastoral Management
Setup: Pastoral Record Types

Pastoral record types setup creates the reason types for a pastoral record, e.g. illness, bereavement or problems at home etc.

Save Cancel

Show Hidden ☐

	In Use	Description
		Unable to delete record as it is linked to a pastoral record.
<input checked="" type="radio"/>	<input checked="" type="checkbox"/>	Parents/Guardians Divorcing
<input type="radio"/>	<input checked="" type="checkbox"/>	Bereavement
<input type="radio"/>	<input checked="" type="checkbox"/>	Bullying
<input type="radio"/>	<input checked="" type="checkbox"/>	Antisocial Behaviour
<input type="radio"/>	<input checked="" type="checkbox"/>	Relocation
<input type="radio"/>	<input checked="" type="checkbox"/>	

Setting up Categories

HOW TO SET UP A CATEGORY

- Go to **Pastoral / Behaviour > Pastoral Management** and click **Category** in the **Configuration** menu.

The **Setup: Category Search** screen appears.

Pastoral Management
Setup: Category Search

Category: Search Reset

Add


Actions	Category	In Use
<input type="radio"/> <input type="radio"/> <input type="radio"/>	Critical	<input checked="" type="checkbox"/>
<input type="radio"/> <input type="radio"/> <input type="radio"/>	High Priority	<input checked="" type="checkbox"/>
<input type="radio"/> <input type="radio"/> <input type="radio"/>	Low Priority	<input checked="" type="checkbox"/>
<input type="radio"/> <input type="radio"/> <input type="radio"/>	Medium Priority	<input checked="" type="checkbox"/>
<input type="radio"/> <input type="radio"/> <input type="radio"/>	Very High Priority	<input checked="" type="checkbox"/>

Page Size: 5 10 25 50 100 Records: 5

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

- Click **Add**.

The **Setup: Add a Category** screen appears.


Pastoral Management
 Setup: Add a Category
 Pastoral Management Dashboard

Pastoral categories allow priorities to be created, e.g. Confidential, High, Medium etc. They are also used to control whether a member of staff is able to view a particular type of category, e.g. 'Confidential' can be marked as only available to certain members of staff.

Save Cancel

Category:

Visible to All Staff/Roles: ☐

Staff/Roles Visibility: Q

In Use: ☒

GIRFEC Forms:

Child Protection Concern Form 1: ☐

Child Protection Concern Form 2: ☐

Wellbeing Concern Form 1: ☐

Wellbeing Concern Form 2: ☐

Save Cancel



Note: GIRFEC options apply to Scottish schools only. Access must be configured by your System Administrator.



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

3. Click in the **Category** field and add the name of the new pastoral management category.
4. Do ONE of the following:
 - » If the category should be available to everyone, tick the **Visible to All Staff/Roles** check box.



Note: If this box is checked, the **Staff/Roles Visibility** field disappears.

- » If the category is limited to specific colleagues, add one or more names to the **Staff/Roles Visibility** field using auto complete or the **Staff Search** dialog. If you know how to do this, proceed to step 6.

More details...

- » Click in the relevant field and type the first letters of the item you require. Select your choice from the options that appear in the drop list. This is known as auto complete. Repeat this sequence until you have added all the names that you require.

Staff Name:

pa|

DAVIS, Patrick M
 PARKER, Lucy Ann
 PARKER, Simon P
 PARSONS, Albert Trevor

- » Click Q at the end of the field to search for the required record. A **Staff**

Search dialog appears.

Staff Search

Group: Please Select | Please Select

Staff Type: Please Select

Staff Name:

Search

Staff Name	Staff Code	Staff Name	Staff Code
------------	------------	------------	------------

OK **Cancel**

- a. In the top part of the dialog, enter your search criteria and click **Search**. You can filter by:
 - » **Group** – From the first **Group** drop list, select the group type you want, e.g. boarding house, form or subject set, and from the second **Group** drop list, select the person's specific group, e.g. 10A, English etc. (If you do not wish to search by group, select 'None' in the first field.)
 - » **Staff Type** – From the **Staff Type** drop list, select the required type of staff, such as 'Academic', 'Non-Academic' or 'Both'.
 - » **Name** – Type in all or part of a staff member's name in the **Staff Name** field.

The results of your search appear in a list on the left-hand side of the dialog.

- b. Click on each record you want in the list of available options that appears in the bottom left-hand corner.

Staff names move from the left to the right-hand side of the screen once selected.

Staff Search

Group

Form Year

Year 3

Staff Type

Academic

Staff Name

Search

Staff Name	Staff Code	Staff Name	Staff Code
WATSON, Diana	DWJ	BAYTON, Elizabeth	EB
Head of Year	N/A	HILTON, John	HIL001
Form Tutor	N/A		
PIPER, Nigel E	NEP		

3 result(s)

OK

Cancel



Note: To deselect staff, click on the next to the relevant name.

- (Optional) Repeat steps a to b to search for and add other staff members to the list of selected individuals on the right-hand side of the screen.
 - When done, click **OK**.
You are returned to the previous screen with the required staff entered in the relevant field.
- Check the **In Use** check box is ticked to ensure that the category is live and available when pastoral management issues are recorded.
 - (Optional) (Scottish Schools Only) Tick the relevant **GIRFEC Forms** check boxes to indicate which forms can be completed for this category.

Pastoral Management

Setup: Add a Category

Pastoral Management Dashboard

Pastoral categories allow priorities to be created, e.g. Confidential, High, Medium etc. They are also used to control whether a member of staff is able to view a particular type of category, e.g. 'Confidential' can be marked as only available to certain members of staff.

Save Cancel

Category:

Visible to All Staff/Roles:

Staff/Roles Visibility:

In Use:

☒

GIRFEC Forms:

Child Protection Concern Form 1:

Child Protection Concern Form 2:

Wellbeing Concern Form 1:

Wellbeing Concern Form 2:

Save Cancel

Your System Administrator must configure GIRFEC settings for these options to appear. For more information, see ["Configuring GIRFEC" on page 72](#).

7. Click **Save**.

Viewing Categories

HOW TO VIEW A CATEGORY

1. Find the pastoral management category you would like to view.

More details...

- a. Go to **Pastoral / Behaviour > Pastoral Management** and click **Category** in the **Configuration** menu.

The **Setup: Category Search** screen appears.

Actions	Category	In Use
	Critical	<input checked="" type="checkbox"/>
	High Priority	<input checked="" type="checkbox"/>
	Low Priority	<input checked="" type="checkbox"/>
	Medium Priority	<input checked="" type="checkbox"/>
	Very High Priority	<input checked="" type="checkbox"/>

Page Size: 5 10 25 50 100 Records: 5



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

- b. (Optional) Enter all or part of the name of the category you are looking for in the **Category** field and click **Search**.



Note: To clear previous searches, click **Reset**.

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

More details...

- » Click or or on the numbers underneath the grid on the left-hand side to move between pages.
- » Click to go to the first page or to go to the last page.
- » Use the **Page Size** options to see more records on each page.

Page Size: 5 10 25 50 100

2. Click next to the category you would like to view in more detail.

The relevant **Setup: View a Category** screen appears.

Example:

Pastoral Management
 Setup: View a Category

[Pastoral Management Dashboard](#)

[Edit](#)
[Delete](#)
[Search](#)

Category:
 Shape:
 Colour:
 Visible to All Staff/Roles: ☒
 In Use: ☒

[Edit](#)
[Delete](#)
[Search](#)

3. When you have finished viewing the category, do ONE of the following:
- » Click **Pastoral Management Dashboard** to go to the **Pastoral Management** dashboard.
 - » Click **Edit** to amend the category.
 - » Click **Delete** to remove the category from the system.
 - » Click **Search** to go to the **Setup: Category Search** screen.

Editing Categories

HOW TO EDIT A CATEGORY

1. Find the pastoral management category you would like to edit.

More details...

- a. Go to **Pastoral / Behaviour > Pastoral Management** and click **Category** in the **Configuration** menu.

The **Setup: Category Search** screen appears.

Pastoral Management
 Setup: Category Search

[Pastoral Management Dashboard](#)

Category: [Search](#) [Reset](#)

[Add](#)

Actions	Category ^	In Use
	Critical	<input checked="" type="checkbox"/>
	High Priority	<input checked="" type="checkbox"/>
	Low Priority	<input checked="" type="checkbox"/>
	Medium Priority	<input checked="" type="checkbox"/>
	Very High Priority	<input checked="" type="checkbox"/>

[«](#)
[»](#)
[1](#)
[2](#)
[3](#)
[4](#)
[5](#)

Page Size: [5](#) [10](#) [25](#) [50](#) [100](#)

Records: [5](#)



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





- b. (Optional) Enter all or part of the name of the category you are looking for in the **Category** field and click **Search**.



Note: To clear previous searches, click **Reset**.



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

More details...

- » Click  or  or on the numbers underneath the grid on the left-hand side to move between pages.
- » Click  to go to the first page or  to go to the last page.
- » Use the **Page Size** options to see more records on each page.

Page Size:     

2. On the **Setup: Category Search** screen, do ONE of the following:

- » Click  next to your chosen category and select **Edit**.
- » Click  next to your chosen category.

The relevant **Setup: Edit a Category** screen appears.

Example:

3. Make the required changes to the pastoral management category.
4. Click **Save**.

You are returned to the **Setup: Category Search** screen.

Deleting Categories

HOW TO DELETE A CATEGORY

1. Find the pastoral management category that you would like to delete.

More details...

- a. Go to **Pastoral / Behaviour > Pastoral Management** and click **Category** in the

Configuration menu.

The **Setup: Category Search** screen appears.

Pastoral Management
Setup: Category Search

[Pastoral Management Dashboard](#)

Category: [Search](#) [Reset](#)

[Add](#)

Actions	Category	In Use
	Critical	<input checked="" type="checkbox"/>
	High Priority	<input checked="" type="checkbox"/>
	Low Priority	<input checked="" type="checkbox"/>
	Medium Priority	<input checked="" type="checkbox"/>
	Very High Priority	<input checked="" type="checkbox"/>

Page Size: [5](#) [10](#) [25](#) [50](#) [100](#) Records: [5](#)



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

- b. (Optional) Enter all or part of the name of the category you are looking for in the **Category** field and click **Search**.



Note: To clear previous searches, click **Reset**.

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

More details...

- » Click or or on the numbers underneath the grid on the left-hand side to move between pages.
- » Click to go to the first page or to go to the last page.
- » Use the **Page Size** options to see more records on each page.

Page Size: [5](#) [10](#) [25](#) [50](#) [100](#)

2. Click next to the category you would like to delete.
The relevant **Setup: Delete a Category** screen appears.

Example:

Pastoral Management
 Setup: Delete a Category

Pastoral Management Dashboard

Delete

Cancel

Category:

Very High Priority

Shape:

Square

Colour:

Red

Visible to All Staff/Roles:

☒

In Use:

☒

Delete

Cancel

3. Click **Delete**.

If the category is not associated with a record, it is deleted and you are returned to the **Setup: Category Search** screen.

Note: You CANNOT delete a category that is already associated with a pastoral management record.

Pastoral Management
 Setup: Delete a Category

Pastoral Management Dashboard

Delete

Cancel

Unable to delete Category as it is linked to a Pastoral Management Record.

Category:

Critical

Shape:

Star

Colour:

Red

Visible to All Staff/Roles:

☒

In Use:

☒

Delete

Cancel

Allocating Access to Pastoral Management

HOW TO ALLOCATE ACCESS TO PASTORAL MANAGEMENT

1. Find the profile you would like to have access to the **Pastoral Management** module.

More details...

- a. Go to **Setup > Users and profiles > Profiles**.
The **Profile Search** and **Profiles** screen appears.

Profile Search

▼ **Filters**

Profile Name: Linked Users:

Profiles

Actions	Profile Name	Linked Users
View Edit	Admin	<input checked="" type="checkbox"/>
View Edit	Attendance Only	<input checked="" type="checkbox"/>
View Edit	Bursar	<input checked="" type="checkbox"/>
View Edit	Careers	<input type="checkbox"/>
View Edit	Headmaster	<input checked="" type="checkbox"/>
View Edit	HoD	<input checked="" type="checkbox"/>
View Edit	Junior School	<input checked="" type="checkbox"/>
View Edit	Medical	<input checked="" type="checkbox"/>
View Edit	Nursery	<input checked="" type="checkbox"/>
View Edit	PE Department	<input checked="" type="checkbox"/>

Records Per Page: Showing 1 - 10 of 18 Records Page of 2



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

- b. Enter your search criteria in one or more of the fields at the top of the screen, and click **Search**. Your search results populate the grid. You can search by:

Field	Action
Profile Name	Type all or part of the name of the profile you are looking for into this field.
Linked Users	Use the drop list to select the user(s) linked to the profile you are looking for.

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

- » Click or or on the numbers underneath the grid on the left-hand side to move between pages.
- » Click to go to the first page or to go to the last page.
- » Use the **Records Per Page** drop list to see more records on each page.

Records Per Page:

- » Click in the **Page** field and type the number of the page you want.

Page of 1

2. Click **Edit** next to the relevant profile.
3. Use the **Modules** drop list to select 'Pastoral / Behaviour'.

The **Pastoral / Behaviour** options appear, including pastoral management.

Modules:

Configuration Set-up: ☐ Pastoral Management:

Pastoral Reports: ☐

4. (Optional) If users should be able to configure Pastoral Management options, e.g. create categories, tick the **Configuration Set-up** check box.
5. Use the **Pastoral Management** drop list to select the level of access required.
6. (Optional) Tick the **Pastoral Reports** check box if access to pastoral reports is required. (Scottish Schools Only.)
7. Click **Save**.

Configuring GIRFEC

If you are a Scottish school, you can record GIRFEC data using the **Pastoral Management** module. In order to do this, you need to activate the GIRFEC option. Relevant staff also need to be given access to the **Child Protection Concern** report, which is set via profiles.

Activating GIRFEC Options (Scottish Schools Only)

HOW TO ACTIVATE GIRFEC OPTIONS (SCOTTISH SCHOOLS ONLY)

1. Go to **Pastoral / Behaviour > Pastoral Management** and select **GIRFEC** from the **Configuration** menu.

The **Setup: GIRFEC** screen appears.

2. Tick the **GIRFEC** check box.
3. Click **Save**.

Allocating Access to the Child Protection Concern Report (Scottish Schools Only)

HOW TO ALLOCATE ACCESS TO THE CHILD PROTECTION CONCERN REPORT (SCOTTISH SCHOOLS ONLY)

1. Find the profile you want to have access to the **Child Protection Concern** report.



More details...

- a. Go to **Setup > Users and profiles > Profiles**.

The **Profile Search** and **Profiles** screen appears.

Actions	Profile Name	Linked Users
View Edit	Admin	<input checked="" type="checkbox"/>
View Edit	Attendance Only	<input checked="" type="checkbox"/>
View Edit	Bursar	<input checked="" type="checkbox"/>
View Edit	Careers	<input type="checkbox"/>
View Edit	Headmaster	<input checked="" type="checkbox"/>
View Edit	HoD	<input checked="" type="checkbox"/>
View Edit	Junior School	<input checked="" type="checkbox"/>
View Edit	Medical	<input checked="" type="checkbox"/>
View Edit	Nursery	<input checked="" type="checkbox"/>
View Edit	PE Department	<input checked="" type="checkbox"/>







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

- b. Enter your search criteria in one or more of the fields at the top of the screen, and click **Search**. Your search results populate the grid. You can search by:

Field	Action
Profile Name	Type all or part of the name of the profile you are looking for into this field.
Linked Users	Use the drop list to select the user(s) linked to the profile you are looking for.

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

- » Click  or  or on the numbers underneath the grid on the left-hand side to move between pages.
- » Click  to go to the first page or  to go to the last page.
- » Use the **Records Per Page** drop list to see more records on each page.

Records Per Page ▼

- » Click in the **Page** field and type the number of the page you want.

Page of 1

2. Click **Edit** next to the relevant profile.
3. Use the **Modules** drop list to select 'Pastoral / Behaviour'.

The **Pastoral / Behaviour** options appear, including pastoral management.

Modules: Pastoral / Behaviour ▼	
Configuration Set-up: <input type="checkbox"/>	Pastoral Management: <input type="text" value="No Access"/> ▼
Pastoral Reports: <input type="checkbox"/>	
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

4. Tick the **Pastoral Reports** check box.
5. Click **Save**.

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