

3sysACADEMIC

# Pastoral Management

## User Guide



Document Reference: 3008/3

Published by WCBS February 2017

Developed against 3sysACADEMIC Versions 5.0.0 - 5.1.0

Helpline: +44 (0)1458 833 055

Telephone: +44 (0)1458 833 344

Fax: + 44 (0)1458 835297

Email: [support@wcbs.co.uk](mailto:support@wcbs.co.uk)

Website: [www.wcbs.co.uk](http://www.wcbs.co.uk)

Address:

West Country Business Systems (Holdings) Limited

Landmark House, Wirrall Park Road, Glastonbury, Somerset, BA6 9FR, UK

West Country Business Systems Ltd Registered No 1770829 West Country Business Systems (Holdings) Ltd Registered No 3387976

Abattia Group Ltd Registered No 3989092 VAT Registration GB 713 7923 30

© Copyright 2017 West Country Business Systems (Holdings) Limited ® 3sys and pass are registered trademarks and WCBS, WCBS schoolPORTAL, schoolADMIN, webALUMNUS are TM of West Country Business Systems (Holdings) Limited and associated companies

Information in this document is subject to change without notice. The software described in this document is furnished under a license agreement or nondisclosure agreement. The software may be used or copied only in accordance with the terms of those agreements. No part of this publication may be reproduced, stored in a retrieval system, or transmitted in any form or any means electronic or mechanical, including photocopying and recording for any purpose other than the purchaser's personal use without the written permission of West Country Business Systems (Holdings) Limited.

# 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 .....	22
Maintaining Pastoral Records .....	29
Viewing Pastoral Records .....	31
Viewing GIRFEC Forms (Scottish Schools Only) .....	35
Printing GIRFEC Forms (Scottish Schools Only) .....	39
Editing Pastoral Records .....	43
Editing Pastoral Record Notes .....	45
Marking Pastoral Record Actions 'Complete' .....	49
Accessing the Child Protection Concern Report .....	54
Deleting Pastoral Records .....	56

## CHAPTER 3 Configuring Pastoral Management

Configuring Pastoral Management .....	62
Setting up Record Reasons .....	62
Editing Record Reasons .....	63
Deleting Record Reasons .....	64
Setting up Categories .....	65
Viewing Categories .....	69
Editing Categories .....	70
Deleting Categories .....	72
Allocating Access to Pastoral Management .....	73
Configuring GIRFEC .....	76
Activating GIRFEC Options (Scottish Schools Only) .....	76
Allocating Access to the Child Protection Concern Report (Scottish Schools Only) .....	76

**This page has been left blank intentionally.**

# 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

**This page has been left blank intentionally.**

# 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 .....	22
Maintaining Pastoral Records .....	29
Viewing Pastoral Records .....	31
Viewing GIRFEC Forms (Scottish Schools Only) .....	35
Printing GIRFEC Forms (Scottish Schools Only) .....	39
Editing Pastoral Records .....	43
Editing Pastoral Record Notes .....	45
Marking Pastoral Record Actions 'Complete' .....	49
Accessing the Child Protection Concern Report .....	54
Deleting Pastoral Records .....	56

# CHAPTER 2

## 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:

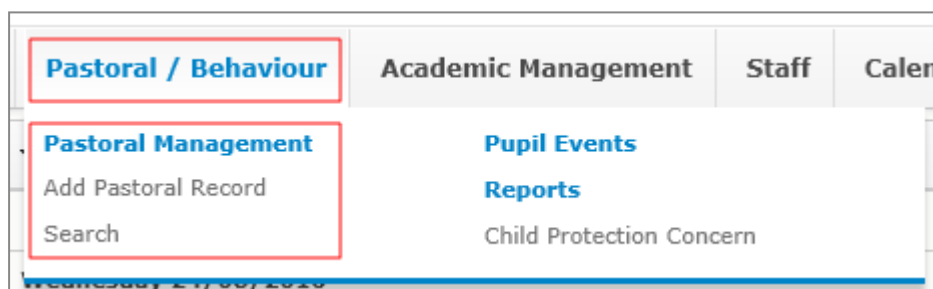
- » Record pastoral management issues for individuals or groups of pupils.
- » Add notes and actions to records.
- » Search records.
- » View, edit and delete pastoral records.
- » Create and update pastoral record types and categories.
- » Complete Getting It Right For Every Child (GIRFEC) forms. (Scottish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

What is **Pastoral Management**<sup>1</sup>?

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

Requires Action By Me						
Actions	Pupil Name(s)	Raised By	Status	Heading	Action Required By	Last Modified By
Q	DAVIS Laura, DAVIS Steven	STRINGER, Robert	Open	Davis Divorce	04/07/2016	30/06/2016, STRINGER, Robert
Q	CAVENDISH Mary, KERR Rebecca	STRINGER, Robert	Open	Allegation of Bullying	01/07/2016	30/06/2016, STRINGER, Robert
Q	ALLAN Tom, ALTON Benjamin, BELL Edward, BURTON James, DAVIES John	STRINGER, Robert	Open	Fighting at Lunchtime	01/07/2016	30/06/2016, STRINGER, Robert
Q	ADAMS Sarah J	STRINGER, Robert	Open	Allegations of Stealing	09/07/2016	08/07/2016, STRINGER, Robert

Recent Pastoral Records					
Actions	Pupil Name(s)	Status	Heading	Date	Last Modified By
Q	DAVIS Laura, DAVIS Steven	Open	Davis Divorce	22/07/2016 11:10:00	22/07/2016, STRINGER, Robert
Q	ADAMS Lauren S, ADAMS Sarah J, ALEXANDER-GUTHERIDGE Rachel	Open	CPC	12/07/2016 10:31:00	12/07/2016, BRVANT Melanie
Q	DUNCAN Katherine	Open	Unusual Behaviour	12/07/2016 09:31:00	12/07/2016, STRINGER, Robert
Q	ADAMS Sarah J	Open	Allegations of Stealing	08/07/2016 09:20:00	08/07/2016, STRINGER, Robert
Q	BURGESS Andrew P	Open	Unusual Behaviour	07/07/2016 15:02:00	07/07/2016, STRINGER, Robert

For more details, see:

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



- » "Adding Pastoral Records" on page 12.
- » "Maintaining Pastoral Records" on page 29.

#### 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.

The screenshot shows the 'Pastoral Management Dashboard' interface. On the left-hand side, there is a navigation menu with the following items: 'Management' (with sub-items 'Add Pastoral Record' and 'Search'), 'Configuration' (highlighted with a red box and containing sub-items 'Record Reason', 'Category', and 'GIRFEC'), and 'Reports' (with sub-item 'Child Protection Concern'). The main area of the dashboard is divided into two sections. The top section is titled 'Requires Action By Me' and contains a table with columns: 'Actions', 'Pupil Name(s)', 'Raised By', 'Status', 'Heading', 'Action Required By', and 'Last Modified By'. It lists four records, with the last one being 'ADAMS Sarah J'. Below this table is a pagination control showing 'Page 1 of 1' and '1 - 4 of 4 Items'. The bottom section is titled 'Recent Pastoral Records' and contains a similar table with columns: 'Actions', 'Pupil Name(s)', 'Status', 'Heading', 'Date', and 'Last Modified By'. It lists five records, including 'DAVIS Laura, DAVIS Steven', 'ADAMS Lauren S, ADAMS Sarah J, ALEXANDER-GUTHERIDGE Rachel', 'DUNCAN Katherine', 'ADAMS Sarah J', and 'BURGESS Andrew P'. A 'Search More Pastoral Records' link is located at the bottom right of this section.

For more details, see:

- » "Configuring Pastoral Management" on page 62.
- » "Configuring GIRFEC" on page 76.

## 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. A warning message appears if there are errors, such as missing or incomplete data, giving the user an opportunity to make corrections.

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 76.

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 62.

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.

The screenshot shows the 'Add a Pastoral Record' form. At the top, it says 'Pastoral Management' and 'Add a Pastoral Record'. There are 'Save' and 'Cancel' buttons. Below that, there's a description: '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.' There are 'Save' and 'Cancel' buttons. The form fields are: Pupil Name(s): ASHFIELD, Gem...; Record Reason(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: [checked]; GIRFEC Forms: Child Protection Concern Form 1, Wellbeing Concern Form 1, Child Protection Concern Form 2, Wellbeing Concern Form 2; Documents: Browse. There are 'Save' and 'Cancel' buttons at the bottom.

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 29.](#)

## 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**

**Requires Action By Me**

Actions	Pupil Name(s)	Raised By	Status	Heading	Action Required By	Last Modified By
	DAVIS Laura, DAVIS Steven	STRINGER, Robert	Open	Davis Divorce	04/07/2016	30/06/2016, STRINGER, Robert
	CAVENDISH Mary, KERR Rebecca	STRINGER, Robert	Open	Allegation of Bullying	01/07/2016	30/06/2016, STRINGER, Robert
	ALLAN Tom, ALTON Benjamin, BELL Edward, BURTON James, DAVIES John	STRINGER, Robert	Open	Fighting at Lunchtime	01/07/2016	30/06/2016, STRINGER, Robert
	ADAMS Sarah J	STRINGER, Robert	Open	Allegations of Stealing	09/07/2016	08/07/2016, STRINGER, Robert

Page 1 of 1 | 1 - 4 of 4 items

**Recent Pastoral Records**

Actions	Pupil Name(s)	Status	Heading	Date	Last Modified By
	DAVIS Laura, DAVIS Steven	Open	Davis Divorce	22/07/2016 11:10:00	22/07/2016, STRINGER, Robert
	ADAMS Lauren S, ADAMS Sarah J, ALEXANDER-GUTHERIDGE Rachel	Open	CPC	12/07/2016 10:31:00	12/07/2016, BRVANT, Melanie
	DUNCAN Katherine	Open	Unusual Behaviour	12/07/2016 09:31:00	12/07/2016, STRINGER, Robert
	ADAMS Sarah J	Open	Allegations of Stealing	08/07/2016 09:20:00	08/07/2016, STRINGER, Robert
	BURGESS Andrew P	Open	Unusual Behaviour	07/07/2016 15:02:00	07/07/2016, STRINGER, Robert

[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**

**Requires Action By Me**

Actions	Pupil Name(s)	Raised By	Status	Heading	Action Required By	Last Modified By
	DAVIS Laura, DAVIS Steven	STRINGER, Robert	Open	Davis Divorce	04/07/2016	30/06/2016, STRINGER, Robert
	CAVENDISH Mary, KERR Rebecca	STRINGER, Robert	Open	Allegation of Bullying	01/07/2016	30/06/2016, STRINGER, Robert
	ALLAN Tom, ALTON Benjamin, BELL Edward, BURTON James, DAVIES John	STRINGER, Robert	Open	Fighting at Lunchtime	01/07/2016	30/06/2016, STRINGER, Robert
	ADAMS Sarah J	STRINGER, Robert	Open	Allegations of Stealing	09/07/2016	08/07/2016, STRINGER, Robert

Page 1 of 1 | 1 - 4 of 4 items

**Recent Pastoral Records**

Actions	Pupil Name(s)	Status	Heading	Date	Last Modified By
	DAVIS Laura, DAVIS Steven	Open	Davis Divorce	22/07/2016 11:10:00	22/07/2016, STRINGER, Robert
	ADAMS Lauren S, ADAMS Sarah J, ALEXANDER-GUTHERIDGE Rachel	Open	CPC	12/07/2016 10:31:00	12/07/2016, BRVANT, Melanie
	DUNCAN Katherine	Open	Unusual Behaviour	12/07/2016 09:31:00	12/07/2016, STRINGER, Robert
	ADAMS Sarah J	Open	Allegations of Stealing	08/07/2016 09:20:00	08/07/2016, STRINGER, Robert
	BURGESS Andrew P	Open	Unusual Behaviour	07/07/2016 15:02:00	07/07/2016, STRINGER, Robert

[Search More Pastoral Records](#)

For more information, see:

- » "Adding Pastoral Records" on the facing page.
- » "Adding Pastoral Record Notes" on page 22.
- » "Maintaining Pastoral Records" on page 29.

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

- 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.

The screenshot shows the 'Add a Pastoral Record' form. At the top, there's a header with a user icon, the text 'Pastoral Management Add a Pastoral Record', and a 'Pastoral Management Dashboard' link. Below the header is a descriptive paragraph: '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.' There are 'Save' and 'Cancel' buttons. The form fields are: 'Pupil Name(s):' with a red bar on the left and a search icon; 'Record Reason(s):' with a red bar on the left and a search icon; 'Staff Names:' with the value 'STRINGER, Robert' and a search icon; 'Date:' with the value '22/07/2016 11:10' and a calendar icon; 'Category:' with a dropdown arrow; 'Status:' with the value 'Open'; 'Heading:' with a red bar on the left; 'Overview:' with a red bar on the left and a large text area. Below the form are two checkboxes: 'Make this Record Visible to All Staff:' (unchecked) and 'Make this Record Visible to Specific Staff/Roles:' (checked) with a search icon and the value 'STRINGER, Rob...'. There is a 'Documents:' section with a 'Browse' button and a note: 'Click 'Browse' to select files for upload or drop files here.' At the bottom, there are 'Save' and 'Cancel' buttons.

**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'.

- 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.

» 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').

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.

Pupil Name	Pupil Code	Form	Pupil Name	Pupil Code	Form
ASHFIELD, Gemma Frances	ASH003	09A	ASLETT, Fletcher	ASL001	09A
BRANGWEN, Ursula	BRA001	09A	BRYANTON, William G	BRY001	09A
BROOKS, Maria	BRO001	09A	LAWRENCE, Helen	LAW001	09A
GUTHRIE, Kate	GUT001	09A			
HOLT, James	HOL001	09A			
MITCHELL, Rebecca	MIT002	09A			
NORGROVE, Mary	NOR001	09A			

13 result(s)



**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 Reason(s)** field.

**More details...**

To select a reason, do ONE of the following:

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

- a. Type all or part of the reason you want into the **Reason** field OR leave it blank to return a complete list of available options.
  - b. Click **Search**.
  - c. Select the reason you want from the list that appears.
4. 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.

**Staff Search** ✖

Group

Staff Type

Staff Name

Staff Name	Staff Code

- 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.

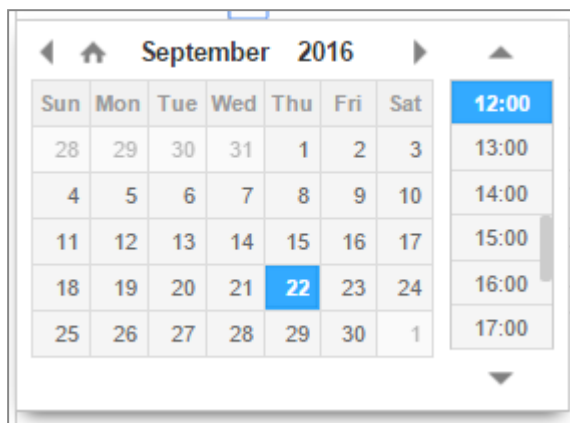
- b. Click on the record you want. You are returned to the previous screen with the required staff record entered in the relevant field.

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.




**Note:** You must ensure that the person who raised the note is included in the list of 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.

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. A **Staff Search** dialog appears.

**Staff Search** ✕

Group

Staff Type

Staff Name

Staff Name	Staff Code	Staff Name	Staff Code

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

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

**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): ASHFIELD, Gem... X

Record Reason(s): Antisocial Behav... X

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.

Save Cancel

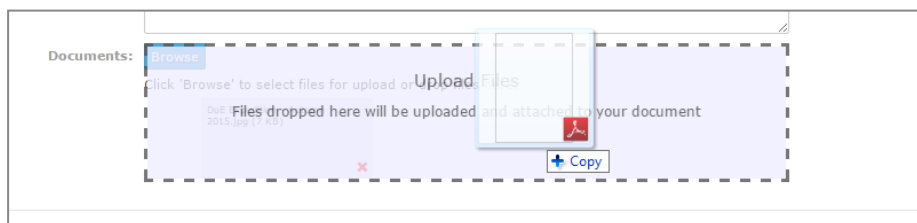
**Note:** When saving a GIRFEC form, warning messages appear if the form contains any errors, such as missing data. This gives you the opportunity to correct the form before saving the record.

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 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): DAVIS, Laura x DAVIS, Steven x

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

Staff Name: STRINGER, Robert

Date: 22/07/2016 11:10

Category: High Priority

Status: Open

Heading: Davis Divorce

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

Make this Record Visible to All Staff:

Documents:   
Click 'Browse' to select files for upload or drop files here.  
Letter from Mr and Mrs Davis\_30-06-2016.docx (15 KB)

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:

Child Protection Concern Form 1:  Child Protection Concern Form 2:

Wellbeing Concern Form 1:  Wellbeing Concern Form 2:

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.

**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 from highest to lowest.

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

Field	Action
<b>Pupil Name</b>	Type all or part of a pupil's name into this field.
<b>Reason</b>	Type all or part of a pastoral management record reason into this field.
<b>Heading</b>	Type all or part of a heading into this field.
<b>Raised By</b>	Type all or part of a colleague's name into this field.
<b>Status</b>	Use this drop list to select the required option.
<b>Action Required</b>	Use this drop list to select 'Yes' or 'No'.
<b>Date</b>	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) To save the search criteria and re-run the same search in the future, tick the **Remember Search** check box.


**Note:** Your search criteria are saved until the user changes them or unticks the check box, even when you leave the screen or log out of the software.

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

e. (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 related **Edit a Pastoral Record** screen appears.

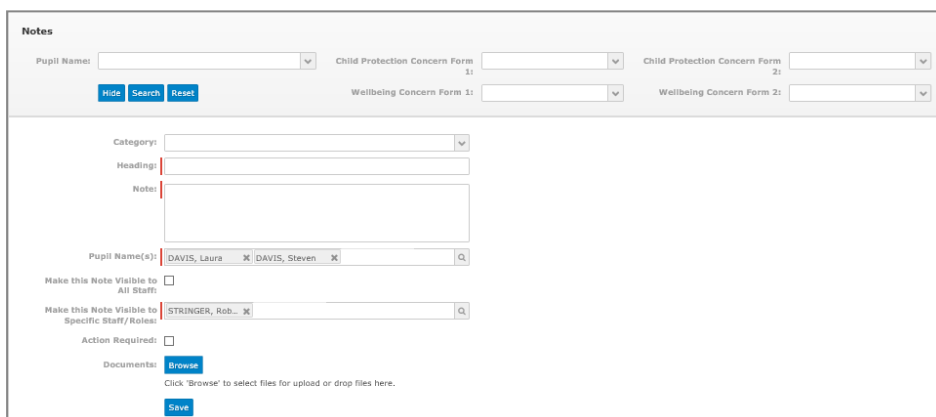


**Note:** The **Edit a Pastoral Record** screen also appears when a record is first created, meaning you can also add notes immediately, if required.

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

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

Further fields appear.




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



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

5. 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.

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

7. (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.

The screenshot shows a text input field labeled "Staff Name:" containing the text "pa". Below the input field, a dropdown menu is open, displaying a list of staff names: "DAVIS, Patrick M", "PARKER, Lucy Ann", "PARKER, Simon P", and "PARSONS, Albert Trevor".

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

The screenshot shows the "Staff Search" dialog box. It contains the following fields and controls:

- Group: Two dropdown menus, both set to "Please Select".
- Staff Type: A dropdown menu set to "Please Select".
- Staff Name: A text input field.
- Search: A blue button.
- Table: A table with four columns: "Staff Name", "Staff Code", "Staff Name", and "Staff Code". The table is currently empty.
- OK and Cancel: Two buttons at the bottom right.

- 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:

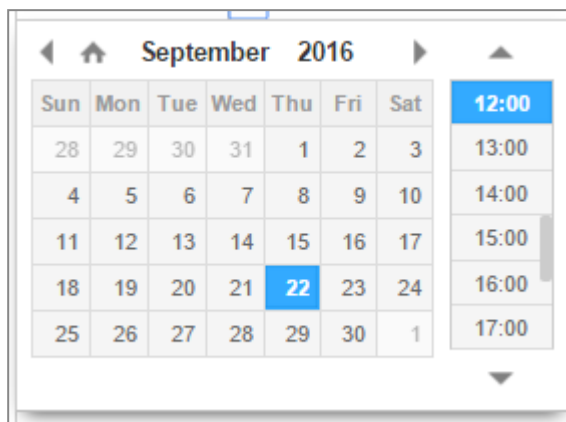
- b. Complete the **Action By Date** field.



**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**.

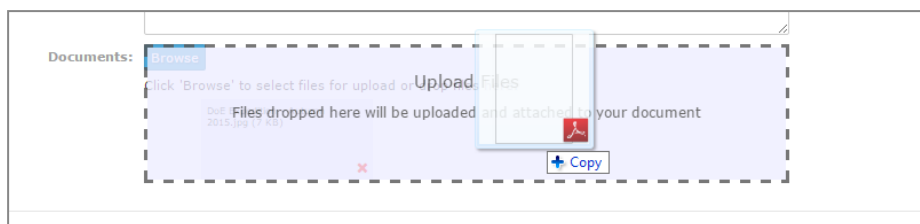
 **Note:** When saving a GIRFEC form, warning messages appear if the form contains any errors, such as missing data. This gives you the opportunity to correct the form before saving the record.


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 removed 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: 31/01/2017 17:06

Action By: STRINGER, Rob... X

Documents: **Browse**


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

**Save**

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

X

**Message from webpage**

 The staff below needs visibility over the pastoral Record. Are you sure you wish to proceed?  
BAKER, Molly B  
WRIGHT, Diana

OK      Cancel

## 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 62.

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 22 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:

**Absence Arrangements**

**Action By: 04 July 2016** || STRINGER, Robert (30 June 2015)

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:      Records:

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		Requires Action By Me					
Actions	Pupil Name(s)	Raised By	Status	Heading	Action Required By	Last Modified By	
	DAVIS Laura, DAVIS Steven	STRINGER, Robert	Open	Davis Divorce	04/07/2016	30/06/2016, STRINGER, Robert	
	CAVENDISH Mary, KERR Rebecca	STRINGER, Robert	Open	Allegation of Bullying	01/07/2016	30/06/2016, STRINGER, Robert	
	ALLAN Tom, ALTON Benjamin, BELL Edward, BURTON James, DAVIES John	STRINGER, Robert	Open	Fighting at Lunchtime	01/07/2016	30/06/2016, STRINGER, Robert	
	ADAMS Sarah J	STRINGER, Robert	Open	Allegations of Stealing	09/07/2016	08/07/2016, STRINGER, Robert	

Page 1 of 1 1 - 4 of 4 items

Recent Pastoral Records					
Actions	Pupil Name(s)	Status	Heading	Date	Last Modified By
	DAVIS Laura, DAVIS Steven	Open	Davis Divorce	22/07/2016 11:10:00	22/07/2016, STRINGER, Robert
	ADAMS Lauren S, ADAMS Sarah J, ALEXANDER-GUTHERIDGE Rachel	Open	CPC	12/07/2016 10:31:00	12/07/2016, BRYANT, Melanie
	DUNCAN Katherine	Open	Unusual Behaviour	12/07/2016 09:31:00	12/07/2016, STRINGER, Robert
	ADAMS Sarah J	Open	Allegations of Stealing	08/07/2016 09:20:00	08/07/2016, STRINGER, Robert
	BURGESS Andrew P	Open	Unusual Behaviour	07/07/2016 15:02:00	07/07/2016, STRINGER, Robert

[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 facing page.
- » "Viewing GIRFEC Forms (Scottish Schools Only)" on page 35.
- » "Printing GIRFEC Forms (Scottish Schools Only)" on page 39.
- » "Editing Pastoral Records" on page 43 (including how to add GIRFEC forms).
- » "Editing Pastoral Record Notes" on page 45 (including how to edit GIRFEC forms).
- » "Marking Pastoral Record Actions 'Complete'" on page 49.
- » "Accessing the Child Protection Concern Report" on page 54.
- » "Deleting Pastoral Records" on page 56.



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

## Viewing Pastoral Records

### HOW TO VIEW A PASTORAL RECORD

1. Find the pastoral record that you would like to view 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.



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



Requires Action By Me							
Actions	Pupil Name(s)	Raised By	Status	Heading	Action Required By	Last Modified By	
Q ✓	DAVIS Laura, DAVIS Steven	STRINGER, Robert	Open	Divorice	04/07/2016	30/06/2016, STRINGER, Robert	
Q ✓	CAVENDISH Mary, KERR Rebecca	STRINGER, Robert	Open	Allegation of Bullying	01/07/2016	30/06/2016, STRINGER, Robert	
Q ✓	ALLAN Tom, ALTON Benjamin, BELL Edward, BURTON James, DAVES John	STRINGER, Robert	Open	Fighting at Lunchtime	01/07/2016	30/06/2016, STRINGER, Robert	
Q ✓	ADAMS Sarah J	STRINGER, Robert	Open	Allegations of Stealing	09/07/2016	08/07/2016, STRINGER, Robert	





Page 1 of 1

Recent Pastoral Records					
Actions	Pupil Name(s)	Status	Heading	Date	Last Modified By
Q ✓	DAVIS Laura, DAVIS Steven	Open	Divorice	22/07/2016 11:10:00	22/07/2016, STRINGER, Robert
Q ✓	ADAMS Lauren S, ADAMS Sarah J, ALEXANDER-GUTHERIDGE Rachel	Open	CPC	12/07/2016 10:31:00	12/07/2016, BRIVANT, Melanie
Q ✓	DUNICAN Katherine	Open	Unusual Behaviour	12/07/2016 09:31:00	12/07/2016, STRINGER, Robert
Q ✓	ADAMS Sarah J	Open	Allegations of Stealing	08/07/2016 09:20:00	08/07/2016, STRINGER, Robert
Q ✓	BURGESS Andrew P	Open	Unusual Behaviour	07/07/2016 15:02:00	07/07/2016, STRINGER, Robert

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 from 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.

The screenshot shows the 'Pastoral Management Pastoral Record Search' interface. At the top, there are search filters for Pupil Name, Reason, Heading, Raised By, Status, and Action Required. Below the filters is a table with columns: Actions, Pupil Name, Reason, Heading, Raised By, Status, Action Required, Date, and Last Modified By. The table contains several rows of data, including records for ADAMS Lauren S, ADAMS Sarah J, ALLAN Tom, and ALLAN Tom, BOULLILLON Lewis J.

Actions	Pupil Name	Reason	Heading	Raised By	Status	Action Required	Date	Last Modified By
	ADAMS Lauren S, ADAMS Sarah J	Relocation	Returned Pupils	STRINGER, Robert	Open	<input type="checkbox"/>	18/04/2016	30/06/2016, STRINGER, Robert
	ADAMS Lauren S, ADAMS Sarah J, ALEXANDER-GUTHERIDGE Rachel	Parents/Guardians Divorcing	CPC	BRYANT, Melanie	Open	<input type="checkbox"/>	12/07/2016	12/07/2016, BRYANT, Melanie
	ADAMS Sarah J	Antisocial Behaviour	Allegations of Stealing	STRINGER, Robert	Open	<input checked="" type="checkbox"/>	08/07/2016	08/07/2016, STRINGER, Robert
	ALLAN Tom, ALTON Benjamin, BELL Edward, BURTON James, DAVIES John	Antisocial Behaviour	Fighting at Lunchtime	STRINGER, Robert	Open	<input checked="" type="checkbox"/>	24/06/2016	30/06/2016, STRINGER, Robert
	ALLAN Tom, BOULLILLON Lewis J	Bullying	Allegation of Bullying	BELL, Alexander	Open	<input type="checkbox"/>	19/05/2016	30/06/2016, STRINGER, Robert

**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 from highest to lowest.

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

Field	Action
<b>Pupil Name</b>	Type all or part of a pupil's name into this field.
<b>Reason</b>	Type all or part of a pastoral management record reason into this field.
<b>Heading</b>	Type all or part of a heading into this field.
<b>Raised By</b>	Type all or part of a colleague's name into this field.
<b>Status</b>	Use this drop list to select the required option.
<b>Action Required</b>	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) To save the search criteria and re-run the same search in the future, tick the **Remember Search** check box.

**Note:** Your search criteria are saved until the user changes them or unticks the check box, even when you leave the screen or log out of the software.

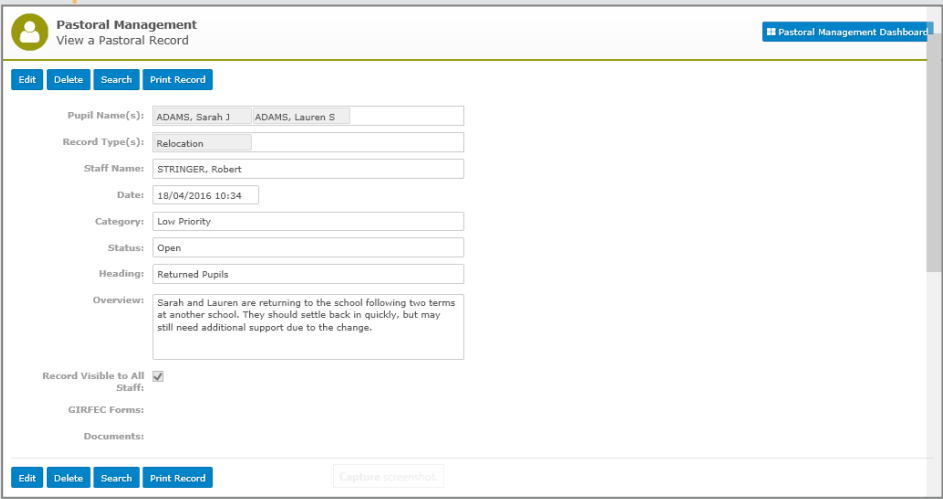
- d. Click **Search**. Your results populate the grid.
- e. (Optional) Use the **Page** icons beneath the grid to navigate between pages of results.

- » 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 43](#).
- » Click **Delete** to go to the **Delete a Pastoral Record** screen and remove the record from the system.
- » 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.



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

Requires Action By Me							
Actions	Pupil Name(s)	Raised By	Status	Heading	Action Required By	Last Modified By	
Q ✓	DAVIS Laura, DAVIS Steven	STRINGER, Robert	Open	Divorice	04/07/2016	30/06/2016, STRINGER, Robert	
Q ✓	CAVENDISH Mary, KERR Rebecca	STRINGER, Robert	Open	Allegation of Bullying	01/07/2016	30/06/2016, STRINGER, Robert	
Q ✓	ALLAN Tom, ALTON Benjamin, BELL Edward, BURTON James, DAVES John	STRINGER, Robert	Open	Fighting at Lunchtime	01/07/2016	30/06/2016, STRINGER, Robert	
Q ✓	ADAMS Sarah J	STRINGER, Robert	Open	Allegations of Stealing	09/07/2016	08/07/2016, STRINGER, Robert	

Page 1 of 1

Recent Pastoral Records					
Actions	Pupil Name(s)	Status	Heading	Date	Last Modified By
Q ✓	DAVIS Laura, DAVIS Steven	Open	Divorice	22/07/2016 11:10:00	22/07/2016, STRINGER, Robert
Q ✓	ADAMS Lauren S, ADAMS Sarah J, ALEXANDER-GUTHERIDGE Rachel	Open	CPC	12/07/2016 10:31:00	12/07/2016, BRIVANT, Melanie
Q ✓	DUNICAN Katherine	Open	Unusual Behaviour	12/07/2016 09:31:00	12/07/2016, STRINGER, Robert
Q ✓	ADAMS Sarah J	Open	Allegations of Stealing	08/07/2016 09:20:00	08/07/2016, STRINGER, Robert
Q ✓	BURGESS Andrew P	Open	Unusual Behaviour	07/07/2016 15:02:00	07/07/2016, STRINGER, Robert

**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 from 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	Reason	Heading	Raised By	Status	Action Required	Date	Last Modified By
	ADAMS Lauren S, ADAMS Sarah J	Relocation	Returned Pupils	STRINGER, Robert	Open	<input type="checkbox"/>	18/04/2016	30/06/2016, STRINGER, Robert
	ADAMS Lauren S, ADAMS Sarah J, ALEXANDER-GUTHERIDGE Rachel	Parents/Guardians Divorcing	CPC	BRYANT, Melanie	Open	<input type="checkbox"/>	12/07/2016	12/07/2016, BRYANT, Melanie
	ADAMS Sarah J	Antisocial Behaviour	Allegations of Stealing	STRINGER, Robert	Open	<input checked="" type="checkbox"/>	08/07/2016	08/07/2016, STRINGER, Robert
	ALLAN Tom, ALTON Benjamin, BELL Edward, BURTON James, DAVIES John	Antisocial Behaviour	Fighting at Lunchtime	STRINGER, Robert	Open	<input checked="" type="checkbox"/>	24/06/2016	30/06/2016, STRINGER, Robert
	ALLAN Tom, BOULLON Louis J	Bullying	Allegation of Bullying	BELL, Alexander	Open	<input type="checkbox"/>	19/05/2016	30/06/2016, STRINGER, Robert

**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 from highest to lowest.

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

Field	Action
<b>Pupil Name</b>	Type all or part of a pupil's name into this field.
<b>Reason</b>	Type all or part of a pastoral management record reason into this field.
<b>Heading</b>	Type all or part of a heading into this field.
<b>Raised By</b>	Type all or part of a colleague's name into this field.
<b>Status</b>	Use this drop list to select the required option.
<b>Action Required</b>	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) To save the search criteria and re-run the same search in the future, tick the **Remember Search** check box.




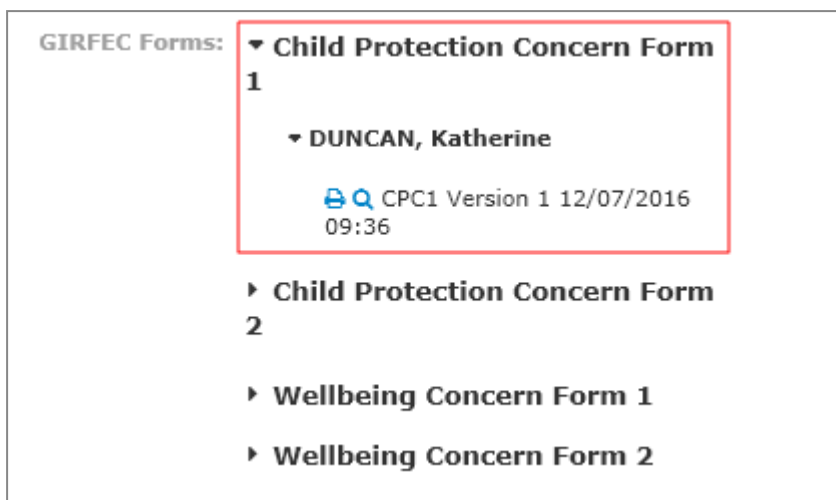
**Note:** Your search criteria are saved until the user changes them or unticks the check box, even when you leave the screen or log out of the software.


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



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)

1. Find the pastoral record associated with the GIRFEC form you want to print 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.







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

Pastoral Management Dashboard							
<b>Management</b>							
<b>Requires Action By Me</b>							
<b>Actions</b>	<b>Pupil Name(s)</b>	<b>Raised By</b>	<b>Status</b>	<b>Heading</b>	<b>Action Required By</b>	<b>Last Modified By</b>	
Q ✓	DAVIS Laura, DAVIS Steven	STRINGER, Robert	Open	Divorice	04/07/2016	30/06/2016, STRINGER, Robert	
Q ✓	CAVENISH Mary, KERR Rebecca	STRINGER, Robert	Open	Allegation of Bullying	01/07/2016	30/06/2016, STRINGER, Robert	
Q ✓	ALLAN Tom, ALTON Benjamin, BELL Edward, BURTON James, DAVES John	STRINGER, Robert	Open	Fighting at Lunchtime	01/07/2016	30/06/2016, STRINGER, Robert	
Q ✓	ADAMS Sarah J	STRINGER, Robert	Open	Allegations of Stealing	09/07/2016	08/07/2016, STRINGER, Robert	
Page 1 of 1							
<b>Recent Pastoral Records</b>							
<b>Actions</b>	<b>Pupil Name(s)</b>	<b>Status</b>	<b>Heading</b>	<b>Date</b>	<b>Last Modified By</b>		
Q ✓	DAVIS Laura, DAVIS Steven	Open	Divorice	22/07/2016 11:10:00	22/07/2016, STRINGER, Robert		
Q ✓	ADAMS Lauren S, ADAMS Sarah J, ALEXANDER-GUTHERIDGE Rachel	Open	CPC	12/07/2016 10:31:00	12/07/2016, BRYANT, Melanie		
Q ✓	DUNICAN Katherine	Open	Unusual Behaviour	12/07/2016 09:31:00	12/07/2016, STRINGER, Robert		
Q ✓	ADAMS Sarah J	Open	Allegations of Stealing	08/07/2016 09:20:00	08/07/2016, STRINGER, Robert		
Q ✓	BURGESS Andrew P	Open	Unusual Behaviour	07/07/2016 13:02:00	07/07/2016, STRINGER, Robert		
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 from 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	Reason	Heading	Raised By	Status	Action Required	Date	Last Modified By
	ADAMS Lauren S, ADAMS Sarah J	Relocation	Returned Pupils	STRINGER, Robert	Open	<input type="checkbox"/>	18/04/2016	30/06/2016, STRINGER, Robert
	ADAMS Lauren S, ADAMS Sarah J, ALEXANDER-GUTHERIDGE Rachel	Parents/Guardians Divorcing	CPC	BRYANT, Melanie	Open	<input type="checkbox"/>	12/07/2016	12/07/2016, BRYANT, Melanie
	ADAMS Sarah J	Antisocial Behaviour	Allegations of Stealing	STRINGER, Robert	Open	<input checked="" type="checkbox"/>	08/07/2016	08/07/2016, STRINGER, Robert
	ALLAN Tom, ALTON Benjamin, BELL Edward, BURTON James, DAVIES John	Antisocial Behaviour	Fighting at Lunchtime	STRINGER, Robert	Open	<input checked="" type="checkbox"/>	24/06/2016	30/06/2016, STRINGER, Robert
	ALLAN Tom, BOULLILLON Lewis J	Bullying	Allegation of Bullying	BELL, Alexander	Open	<input type="checkbox"/>	19/05/2016	30/06/2016, STRINGER, Robert

**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 from highest to lowest.

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

Field	Action
<b>Pupil Name</b>	Type all or part of a pupil's name into this field.
<b>Reason</b>	Type all or part of a pastoral management record reason into this field.
<b>Heading</b>	Type all or part of a heading into this field.
<b>Raised By</b>	Type all or part of a colleague's name into this field.
<b>Status</b>	Use this drop list to select the required option.
<b>Action Required</b>	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) To save the search criteria and re-run the same search in the future, tick the **Remember Search** check box.



**Note:** Your search criteria are saved until the user changes them or unticks the check box, even when you leave the screen or log out of the software.


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

## Editing Pastoral Records

### HOW TO EDIT A PASTORAL RECORD

1. Find the pastoral record that you would like to edit 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.





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

Pastoral Management Dashboard							
Requires Action By Me							
Actions	Pupil Name(s)	Raised By	Status	Heading	Action Required By	Last Modified By	
Q ✓	DAVIS Laura, DAVIS Steven	STRINGER, Robert	Open	Divorice	04/07/2016	30/06/2016, STRINGER, Robert	
Q ✓	CAVENDISH Mary, KERR Rebecca	STRINGER, Robert	Open	Allegation of Bullying	01/07/2016	30/06/2016, STRINGER, Robert	
Q ✓	ALLAN Tom, ALTON Benjamin, BELL Edward, BURTON James, DAVES John	STRINGER, Robert	Open	Fighting at Lunchtime	01/07/2016	30/06/2016, STRINGER, Robert	
Q ✓	ADAMS Sarah J	STRINGER, Robert	Open	Allegations of Stealing	09/07/2016	08/07/2016, STRINGER, Robert	
Page 1 of 1							
Recent Pastoral Records							
Actions	Pupil Name(s)	Status	Heading	Date	Last Modified By		
Q ✓	DAVIS Laura, DAVIS Steven	Open	Divorice	22/07/2016 11:10:00	22/07/2016, STRINGER, Robert		
Q ✓	ADAMS Lauren S, ADAMS Sarah J, ALEXANDER-GUTHERIDGE Rachel	Open	CPC	12/07/2016 10:31:00	12/07/2016, BRIVANT, Melanie		
Q ✓	DUNICAN Katherine	Open	Unusual Behaviour	12/07/2016 09:31:00	12/07/2016, STRINGER, Robert		
Q ✓	ADAMS Sarah J	Open	Allegations of Stealing	08/07/2016 09:20:00	08/07/2016, STRINGER, Robert		
Q ✓	BURGESS Andrew P	Open	Unusual Behaviour	07/07/2016 15:02:00	07/07/2016, STRINGER, Robert		
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 from 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	Reason	Heading	Raised By	Status	Action Required	Date	Last Modified By
	ADAMS Lauren S, ADAMS Sarah J	Relocation	Returned Pupils	STRINGER, Robert	Open	<input type="checkbox"/>	18/04/2016	30/06/2016, STRINGER, Robert
	ADAMS Lauren S, ADAMS Sarah J, ALEXANDER-GUTHERIDGE Rachel	Parents/Guardians Divorcing	CPC	BRYANT, Melanie	Open	<input type="checkbox"/>	12/07/2016	12/07/2016, BRYANT, Melanie
	ADAMS Sarah J	Antisocial Behaviour	Allegations of Stealing	STRINGER, Robert	Open	<input checked="" type="checkbox"/>	08/07/2016	08/07/2016, STRINGER, Robert
	ALLAN Tom, ALTON Benjamin, BELL Edward, BURTON James, DAVIES John	Antisocial Behaviour	Fighting at Lunchtime	STRINGER, Robert	Open	<input checked="" type="checkbox"/>	24/06/2016	30/06/2016, STRINGER, Robert
	ALLAN Tom, BOULLILLON Lewis J	Bullying	Allegation of Bullying	BELL, Alexander	Open	<input type="checkbox"/>	19/05/2016	30/06/2016, STRINGER, Robert

**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 from highest to lowest.


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





Field	Action
<b>Pupil Name</b>	Type all or part of a pupil's name into this field.
<b>Reason</b>	Type all or part of a pastoral management record reason into this field.
<b>Heading</b>	Type all or part of a heading into this field.
<b>Raised By</b>	Type all or part of a colleague's name into this field.
<b>Status</b>	Use this drop list to select the required option.
<b>Action Required</b>	Use this drop list to select 'Yes' or 'No'.

<b>Date</b>	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) To save the search criteria and re-run the same search in the future, tick the **Remember Search** check box.

 **Note:** Your search criteria are saved until the user changes them or unticks the check box, even when you leave the screen or log out of the software.


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



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



- 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.



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

Pastoral Management Dashboard							
Requires Action By Me							
Actions	Pupil Name(s)	Raised By	Status	Heading	Action Required By	Last Modified By	
Q	DAVIS Laura, DAVIS Steven	STRINGER, Robert	Open	Davis Divorce	04/07/2016	30/06/2016, STRINGER, Robert	
Q	CAVENDISH Mary, KERR Rebecca	STRINGER, Robert	Open	Allegation of Bullying	01/07/2016	30/06/2016, STRINGER, Robert	
Q	ALLAN Tom, ALTON Benjamin, BELL Edward, BURTON James, DAVIES John	STRINGER, Robert	Open	Fighting at Lunchtime	01/07/2016	30/06/2016, STRINGER, Robert	
Q	ADAMS Sarah J	STRINGER, Robert	Open	Allegations of Stealing	09/07/2016	08/07/2016, STRINGER, Robert	

Page 1 of 1

Recent Pastoral Records					
Actions	Pupil Name(s)	Status	Heading	Date	Last Modified By
Q	DAVIS Laura, DAVIS Steven	Open	Davis Divorce	22/07/2016 11:10:00	22/07/2016, STRINGER, Robert
Q	ADAMS Lauren S, ADAMS Sarah J, ALEXANDER-GUTHERIDGE Rachel	Open	CPC	12/07/2016 10:31:00	12/07/2016, BRYANT, Melanie
Q	DUNCAN Katherine	Open	Unusual Behaviour	12/07/2016 09:31:00	12/07/2016, STRINGER, Robert
Q	ADAMS Sarah J	Open	Allegations of Stealing	08/07/2016 09:20:00	08/07/2016, STRINGER, Robert
Q	BURGESS Andrew P	Open	Unusual Behaviour	07/07/2016 15:02:00	07/07/2016, STRINGER, Robert

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 from 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.

**Pastoral Management**  
Pastoral Record Search

Pupil Name:  Reason:  Heading:   
 Raised By:  Status:  Action Required:   
 Date:  -  Remember Search:

**Table:**

Actions	Pupil Name	Reason	Heading	Raised By	Status	Action Required	Date	Last Modified By
	ADAMS Lauren S, ADAMS Sarah J	Relocation	Returned Pupil	STRINGER, Robert	Open	<input type="checkbox"/>	18/04/2016	30/06/2016, STRINGER, Robert
	ADAMS Lauren S, ADAMS Sarah J, ALEXANDER-GUTHERIDGE Rachel	Parents/Guardians Divorcing	CPC	BRYANT, Melanie	Open	<input type="checkbox"/>	12/07/2016	12/07/2016, BRYANT, Melanie
	ADAMS Sarah J	Antisocial Behaviour	Allegations of Stealing	STRINGER, Robert	Open	<input checked="" type="checkbox"/>	08/07/2016	08/07/2016, STRINGER, Robert
	ALLAN Tom, ALTON Benjamin, BELL Edward, BURTON James, DAVIES John	Antisocial Behaviour	Fighting at Lunchtime	STRINGER, Robert	Open	<input checked="" type="checkbox"/>	24/06/2016	30/06/2016, STRINGER, Robert
	ALLAN Tom, BOULLON Louis J	Bullying	Allegation of Bullying	BELL, Alexander	Open	<input type="checkbox"/>	19/05/2016	30/06/2016, STRINGER, Robert

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 from highest to lowest.

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

Field	Action
<b>Pupil Name</b>	Type all or part of a pupil's name into this field.
<b>Reason</b>	Type all or part of a pastoral management record reason into this field.
<b>Heading</b>	Type all or part of a heading into this field.
<b>Raised By</b>	Type all or part of a colleague's name into this field.
<b>Status</b>	Use this drop list to select the required option.
<b>Action Required</b>	Use this drop list to select 'Yes' or 'No'.
<b>Date</b>	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) To save the search criteria and re-run the same search in the future, tick the **Remember Search** check box.



**Note:** Your search criteria are saved until the user changes them or unticks the check box, even when you leave the screen or log out of the software.

- d. Click **Search**. Your results populate the grid.
- e. (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:

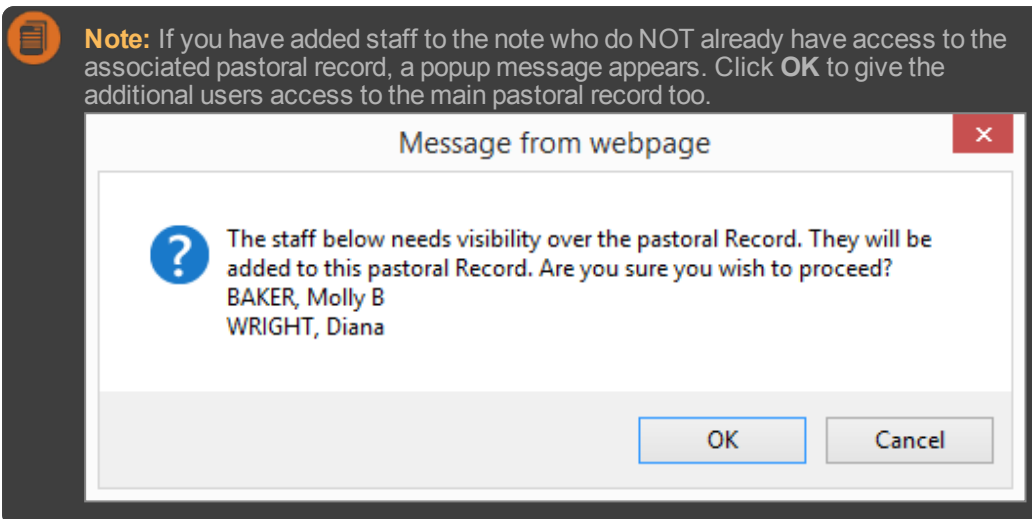
Field	Action
<b>Pupil Name</b>	Type all or part of the pupil's name into this field OR click  to select from the drop list. Click on your choice in the list that appears.
<b>Child Protection Concern Form 1 / Child Protection Concern Form 2 / Wellbeing Concern Form 1 / Wellbeing Concern Form 2</b>	(Scottish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

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



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 Reason

Category

GISPEC

**Reports**

Child Protection Concern

**Requires Action By Me**

Actions	Pupil Name(s)	Raised By	Status	Heading	Action Required By	Last Modified By
Q ✓	DAVIS Laura, DAVIS Steven	STRINGER, Robert	Open	Davis Divorce	04/07/2016	30/06/2016, STRINGER, Robert
Q ✓	CAVENDISH Mary, KERR Rebecca	STRINGER, Robert	Open	Allegation of Bullying	01/07/2016	30/06/2016, STRINGER, Robert
Q ✓	ALLAN Tom, ALTON Benjamin, BELL Edward, BURTON James, DAVIES John	STRINGER, Robert	Open	Fighting at Lunchtime	01/07/2016	30/06/2016, STRINGER, Robert
Q ✓	ADAMS Sarah J	STRINGER, Robert	Open	Allegations of Stealing	09/07/2016	08/07/2016, STRINGER, Robert

Page 1 of 1

1 - 4 of 4 items

**Recent Pastoral Records**

Actions	Pupil Name(s)	Status	Heading	Date	Last Modified By
Q ✓	DAVIS Laura, DAVIS Steven	Open	Davis Divorce	22/07/2016 11:10:00	22/07/2016, STRINGER, Robert
Q ✓	ADAMS Lauren S, ADAMS Sarah J, ALEXANDER-GUTHERIDGE Rachel	Open	CPC	12/07/2016 10:31:00	12/07/2016, BRYANT, Melanie
Q ✓	DUNICAN Katherine	Open	Unusual Behaviour	12/07/2016 09:31:00	12/07/2016, STRINGER, Robert
Q ✓	ADAMS Sarah J	Open	Allegations of Stealing	08/07/2016 09:20:00	08/07/2016, STRINGER, Robert
Q ✓	BURGESS Andrew P	Open	Unusual Behaviour	07/07/2016 15:02:00	07/07/2016, STRINGER, Robert

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 from 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	Reason	Heading	Raised By	Status	Action Required	Date	Last Modified By
	ADAMS Lauren S, ADAMS Sarah J	Relocation	Returned Pupils	STRINGER, Robert	Open	<input type="checkbox"/>	18/04/2016	30/06/2016, STRINGER, Robert
	ADAMS Lauren S, ADAMS Sarah J, ALEXANDER-GUTHERIDGE Rachel	Parents/Guardians Divorcing	CPC	BRYANT, Melanie	Open	<input type="checkbox"/>	12/07/2016	12/07/2016, BRYANT, Melanie
	ADAMS Sarah J	Antisocial Behaviour	Allegations of Stealing	STRINGER, Robert	Open	<input checked="" type="checkbox"/>	08/07/2016	08/07/2016, STRINGER, Robert
	ALLAN Tom, ALTON Benjamin, BELL Edward, BURTON James, DAVIES John	Antisocial Behaviour	Fighting at Lunchtime	STRINGER, Robert	Open	<input checked="" type="checkbox"/>	24/06/2016	30/06/2016, STRINGER, Robert
	ALLAN Tom, BOULLON Louis J	Bullying	Allegation of Bullying	BELL, Alexander	Open	<input type="checkbox"/>	19/05/2016	30/06/2016, STRINGER, Robert

**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 from highest to lowest.

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

Field	Action
<b>Pupil Name</b>	Type all or part of a pupil's name into this field.
<b>Reason</b>	Type all or part of a pastoral management record reason into this field.
<b>Heading</b>	Type all or part of a heading into this field.
<b>Raised By</b>	Type all or part of a colleague's name into this field.
<b>Status</b>	Use this drop list to select the required option.
<b>Action Required</b>	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) To save the search criteria and re-run the same search in the future, tick the **Remember Search** check box.

**Note:** Your search criteria are saved until the user changes them or unticks the check box, even when you leave the screen or log out of the software.

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

- 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
-------	--------

<b>Pupil Name</b>	Type all or part of the pupil's name into this field OR click <input type="checkbox"/> to select from the drop list. Click on your choice in the list that appears.
<b>Child Protection Concern Form 1 / Child Protection Concern Form 2 / Wellbeing Concern Form 1 / Wellbeing Concern Form 2</b>	(Scottish Schools Only) Use a drop list to select a GIRFEC form to search by.

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

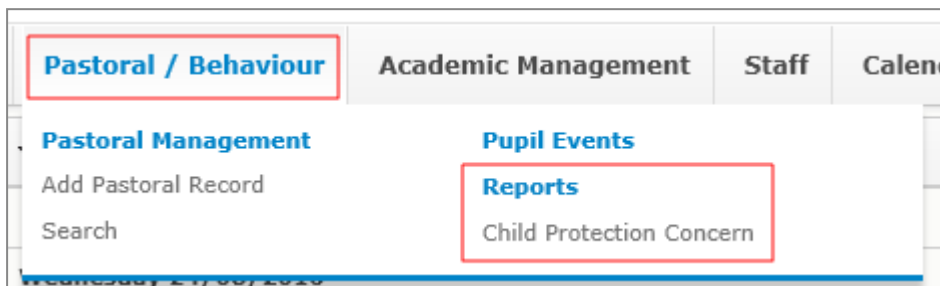
Action Note: This has been done and all subject areas covered.

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**.



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

**Pastoral Management**  
Child Protection Concern Report [Pastoral Management Dashboard](#)

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

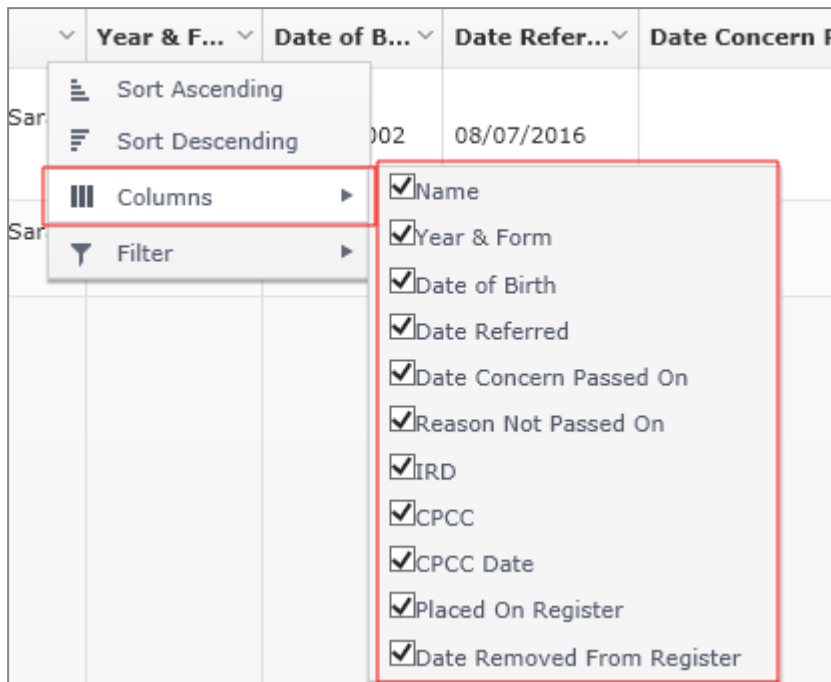
Name	Year & F...	Date of B...	Date Refer...	Date Concern Passed...	Reason Not Passed...	I...	C...	CPCC D...	Placed On Re
ADAMS, Michael Charles	YEAR12 - Year 12 form A (Lower Sixth)	08/07/1993	18/07/2016		Will do tomorrow	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
ALDER,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

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

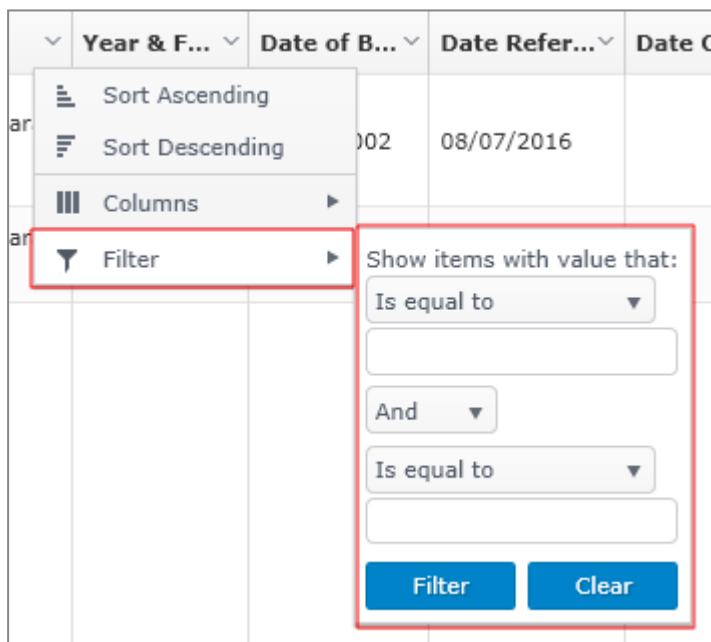


**Note:** The options you see depend upon the permissions set by your System Administrator.

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




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







More details...

- Click  next to the heading you would like to filter by and click **Filter** in the menu that appears.
- 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 .
 

A popup appears asking what you would like to do with the file.
- 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.

## Deleting Pastoral Records

### HOW TO DELETE A PASTORAL RECORD

1. Find the pastoral record that you would like to delete 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.



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



Pastoral Management Dashboard																																											
<b>Management</b> <a href="#">Add Pastoral Record</a> <b>Search</b> <b>Configuration</b> <a href="#">Record Reason</a> <b>Category</b> GIRFEC <b>Reports</b> <a href="#">Child Protection Concern</a>		<b>Requires Action By Me</b> <table border="1"> <thead> <tr> <th>Actions</th> <th>Pupil Name(s)</th> <th>Raised By</th> <th>Status</th> <th>Heading</th> <th>Action Required By</th> <th>Last Modified By</th> </tr> </thead> <tbody> <tr> <td> </td> <td>DAVIS Laura, DAVIS Steven</td> <td>STRINGER, Robert</td> <td>Open</td> <td>Divorc</td> <td>04/07/2016</td> <td>30/06/2016, STRINGER, Robert</td> </tr> <tr> <td> </td> <td>CAVENISH Mary, KERR Rebecca</td> <td>STRINGER, Robert</td> <td>Open</td> <td>Allegation of Bullying</td> <td>01/07/2016</td> <td>30/06/2016, STRINGER, Robert</td> </tr> <tr> <td> </td> <td>ALLAN Tom, ALTON Benjamin, BELL Edward, BURTON James, DAVIES John</td> <td>STRINGER, Robert</td> <td>Open</td> <td>Fighting at Lunchtime</td> <td>01/07/2016</td> <td>30/06/2016, STRINGER, Robert</td> </tr> <tr> <td> </td> <td>ADAMS Sarah J</td> <td>STRINGER, Robert</td> <td>Open</td> <td>Allegations of Stealing</td> <td>09/07/2016</td> <td>08/07/2016, STRINGER, Robert</td> </tr> </tbody> </table> <p>Page 1 of 1</p>						Actions	Pupil Name(s)	Raised By	Status	Heading	Action Required By	Last Modified By		DAVIS Laura, DAVIS Steven	STRINGER, Robert	Open	Divorc	04/07/2016	30/06/2016, STRINGER, Robert		CAVENISH Mary, KERR Rebecca	STRINGER, Robert	Open	Allegation of Bullying	01/07/2016	30/06/2016, STRINGER, Robert		ALLAN Tom, ALTON Benjamin, BELL Edward, BURTON James, DAVIES John	STRINGER, Robert	Open	Fighting at Lunchtime	01/07/2016	30/06/2016, STRINGER, Robert		ADAMS Sarah J	STRINGER, Robert	Open	Allegations of Stealing	09/07/2016	08/07/2016, STRINGER, Robert	
Actions	Pupil Name(s)	Raised By	Status	Heading	Action Required By	Last Modified By																																					
	DAVIS Laura, DAVIS Steven	STRINGER, Robert	Open	Divorc	04/07/2016	30/06/2016, STRINGER, Robert																																					
	CAVENISH Mary, KERR Rebecca	STRINGER, Robert	Open	Allegation of Bullying	01/07/2016	30/06/2016, STRINGER, Robert																																					
	ALLAN Tom, ALTON Benjamin, BELL Edward, BURTON James, DAVIES John	STRINGER, Robert	Open	Fighting at Lunchtime	01/07/2016	30/06/2016, STRINGER, Robert																																					
	ADAMS Sarah J	STRINGER, Robert	Open	Allegations of Stealing	09/07/2016	08/07/2016, STRINGER, Robert																																					
<b>Recent Pastoral Records</b> <table border="1"> <thead> <tr> <th>Actions</th> <th>Pupil Name(s)</th> <th>Status</th> <th>Heading</th> <th>Date</th> <th>Last Modified By</th> </tr> </thead> <tbody> <tr> <td> </td> <td>DAVIS Laura, DAVIS Steven</td> <td>Open</td> <td>Divorc</td> <td>22/07/2016 11:10:00</td> <td>22/07/2016, STRINGER, Robert</td> </tr> <tr> <td> </td> <td>ADAMS Lauren S, ADAMS Sarah J, ALEXANDER-GUTHERIDGE Rachel</td> <td>Open</td> <td>CPC</td> <td>12/07/2016 10:31:00</td> <td>12/07/2016, BRIVANT, Melanie</td> </tr> <tr> <td> </td> <td>DUNICAN Katherine</td> <td>Open</td> <td>Unusual Behaviour</td> <td>12/07/2016 09:31:00</td> <td>12/07/2016, STRINGER, Robert</td> </tr> <tr> <td> </td> <td>ADAMS Sarah J</td> <td>Open</td> <td>Allegations of Stealing</td> <td>08/07/2016 09:20:00</td> <td>08/07/2016, STRINGER, Robert</td> </tr> <tr> <td> </td> <td>BURGESS Andrew P</td> <td>Open</td> <td>Unusual Behaviour</td> <td>07/07/2016 15:02:00</td> <td>07/07/2016, STRINGER, Robert</td> </tr> </tbody> </table> <p>Search More Pastoral Records</p>								Actions	Pupil Name(s)	Status	Heading	Date	Last Modified By		DAVIS Laura, DAVIS Steven	Open	Divorc	22/07/2016 11:10:00	22/07/2016, STRINGER, Robert		ADAMS Lauren S, ADAMS Sarah J, ALEXANDER-GUTHERIDGE Rachel	Open	CPC	12/07/2016 10:31:00	12/07/2016, BRIVANT, Melanie		DUNICAN Katherine	Open	Unusual Behaviour	12/07/2016 09:31:00	12/07/2016, STRINGER, Robert		ADAMS Sarah J	Open	Allegations of Stealing	08/07/2016 09:20:00	08/07/2016, STRINGER, Robert		BURGESS Andrew P	Open	Unusual Behaviour	07/07/2016 15:02:00	07/07/2016, STRINGER, Robert
Actions	Pupil Name(s)	Status	Heading	Date	Last Modified By																																						
	DAVIS Laura, DAVIS Steven	Open	Divorc	22/07/2016 11:10:00	22/07/2016, STRINGER, Robert																																						
	ADAMS Lauren S, ADAMS Sarah J, ALEXANDER-GUTHERIDGE Rachel	Open	CPC	12/07/2016 10:31:00	12/07/2016, BRIVANT, Melanie																																						
	DUNICAN Katherine	Open	Unusual Behaviour	12/07/2016 09:31:00	12/07/2016, STRINGER, Robert																																						
	ADAMS Sarah J	Open	Allegations of Stealing	08/07/2016 09:20:00	08/07/2016, STRINGER, Robert																																						
	BURGESS Andrew P	Open	Unusual Behaviour	07/07/2016 15:02:00	07/07/2016, STRINGER, Robert																																						

**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 from 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	Reason	Heading	Raised By	Status	Action Required	Date	Last Modified By
	ADAMS Lauren S, ADAMS Sarah J	Relocation	Returned Pupils	STRINGER, Robert	Open	<input type="checkbox"/>	18/04/2016	30/06/2016, STRINGER, Robert
	ADAMS Lauren S, ADAMS Sarah J, ALEXANDER-GUTHERIDGE Rachel	Parents/Guardians Divorcing	CPC	BRYANT, Melanie	Open	<input type="checkbox"/>	12/07/2016	12/07/2016, BRYANT, Melanie
	ADAMS Sarah J	Antisocial Behaviour	Allegations of Stealing	STRINGER, Robert	Open	<input checked="" type="checkbox"/>	08/07/2016	08/07/2016, STRINGER, Robert
	ALLAN Tom, ALTON Benjamin, BELL Edward, BURTON James, DAVIES John	Antisocial Behaviour	Fighting at Lunchtime	STRINGER, Robert	Open	<input checked="" type="checkbox"/>	24/06/2016	30/06/2016, STRINGER, Robert
	ALLAN Tom, BOULLON Louis J	Bullying	Allegation of Bullying	BELL, Alexander	Open	<input type="checkbox"/>	19/05/2016	30/06/2016, STRINGER, Robert

**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 from highest to lowest.

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

Field	Action
<b>Pupil Name</b>	Type all or part of a pupil's name into this field.
<b>Reason</b>	Type all or part of a pastoral management record reason into this field.
<b>Heading</b>	Type all or part of a heading into this field.
<b>Raised By</b>	Type all or part of a colleague's name into this field.
<b>Status</b>	Use this drop list to select the required option.
<b>Action Required</b>	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) To save the search criteria and re-run the same search in the future, tick the **Remember Search** check box.

**Note:** Your search criteria are saved until the user changes them or unticks the check box, even when you leave the screen or log out of the software.

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

e. (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.

**Pastoral Management**  
Pastoral Record Search

Pupils Name:  Reason:  Heading:   
 Raised By:  Status:  Action Required:   
 Date:  -  Remember Search:  **Search** **Reset**

**Add**

Actions	Pupil Name	Reason	Heading	Raised By	Status	Action Required	Date	Last Modified By
	ADAMS Lauren S, ADAMS Sarah J	Relocation	Returned Pupils	STRINGER, Robert	Open	<input type="checkbox"/>	18/04/2016	30/06/2016, STRINGER, Robert
	ADAMS Lauren S, ADAMS Sarah J, ALEXANDER-GUTHERIDGE Rachel	Parents/Guardians Divorcing	CPC	BRYANT, Melanie	Open	<input type="checkbox"/>	12/07/2016	12/07/2016, BRYANT, Melanie
	ADAMS Sarah J	Antisocial Behaviour	Allegations of Stealing	STRINGER, Robert	Open	<input checked="" type="checkbox"/>	08/07/2016	08/07/2016, STRINGER, Robert
	ALLAN Tom, ALTON Benjamin, BELL Edward, BURTON James, DAVIES John	Antisocial Behaviour	Fighting at Lunchtime	STRINGER, Robert	Open	<input checked="" type="checkbox"/>	24/06/2016	30/06/2016, STRINGER, Robert
	ALLAN Tom, BOUILLOIN Louis J	Bullying	Allegation of Bullying	BELL, Alexander	Open	<input type="checkbox"/>	19/05/2016	30/06/2016, STRINGER, Robert

Page Size: Records: 14

**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.

# Configuring Pastoral Management

This chapter discusses the following:

Configuring Pastoral Management .....	62
Setting up Record Reasons .....	62
Editing Record Reasons .....	63
Deleting Record Reasons .....	64
Setting up Categories .....	65
Viewing Categories .....	69
Editing Categories .....	70
Deleting Categories .....	72
Allocating Access to Pastoral Management .....	73
Configuring GIRFEC .....	76
Activating GIRFEC Options (Scottish Schools Only) .....	76
Allocating Access to the Child Protection Concern Report (Scottish Schools Only) .....	76

# CHAPTER 3

## Configuring Pastoral Management

Using the **Pastoral Management** module, you can create and maintain the categories and record reasons 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 reasons allow schools to group records by theme, depending upon the organisation's particular preference. Record reasons might include 'Illness', 'Bereavement' or 'Relocation'.

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

- » Set up record reasons - See ["Setting up Record Reasons" below](#).
- » Edit record reasons - See ["Editing Record Reasons" on the facing page](#).
- » Delete record reasons - See ["Deleting Record Reasons" on page 64](#).
- » Set up categories - See ["Setting up Categories" on page 65](#).
- » View categories - See ["Viewing Categories" on page 69](#).
- » Edit categories - See ["Editing Categories" on page 70](#).
- » Delete categories - See ["Deleting Categories" on page 72](#).

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 73](#).



**Note:** Normally, pastoral record reasons 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 Reasons

### HOW TO SET UP A RECORD REASON

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

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

**Pastoral Management**  
Setup: View Pastoral Record Reasons

[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
<input checked="" type="checkbox"/>	Illness (Long Term)
<input checked="" type="checkbox"/>	Illness (Short Term)
<input checked="" type="checkbox"/>	Concerning Behaviour

Edit
Search

2. Click **Edit**.
3. Click in the empty **Description** field in the bottom row and type the name of the new pastoral record reason.

Pastoral Management  
Setup: Pastoral Record Reasons

Pastoral record reasons 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 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
<input checked="" type="checkbox"/>	Illness (Long Term)
<input checked="" type="checkbox"/>	Illness (Short Term)
<input checked="" type="checkbox"/>	Concerning Behaviour
<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.

4. In the same row, ensure that the **In Use** check box is ticked to make the new pastoral record reason live and available for others to use.
5. Click **Save**.

## Editing Record Reasons

### HOW TO EDIT A RECORD REASON

1. Find the record reason that you would like to edit.

More details...

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

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

Pastoral Management  
Setup: View Pastoral Record Reasons

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
<input checked="" type="checkbox"/>	Illness (Long Term)
<input checked="" type="checkbox"/>	Illness (Short Term)
<input checked="" type="checkbox"/>	Concerning Behaviour


Edit Search

- b. (Optional) Check the **Show Hidden** check box to show a complete list of pastoral record reasons, including those that are not currently in use.

2. Click **Edit**.
3. 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 reason.

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

## Deleting Record Reasons

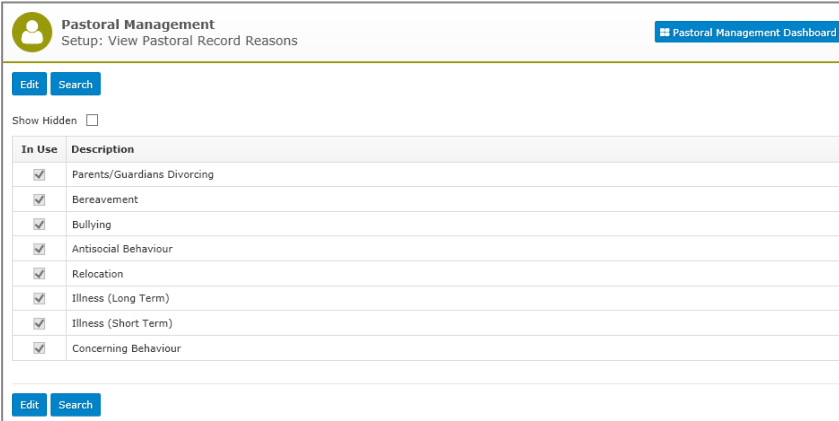
### HOW TO DELETE A RECORD REASON

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


More details...


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


The **Setup: View Pastoral Record Reasons** 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
<input checked="" type="checkbox"/>	Illness (Long Term)
<input checked="" type="checkbox"/>	Illness (Short Term)
<input checked="" type="checkbox"/>	Concerning Behaviour

- b. (Optional) Check the **Show Hidden** check box to show a complete list of pastoral record reasons, including those that are not currently in use.
2. Click **Edit**.
  3. Click  next to the reason 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 reason that is already associated with a record.

**Pastoral Management**  
 Setup: Pastoral Record Reasons

Pastoral Management Dashboard

Pastoral record reasons 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"/>		<input checked="" type="checkbox"/>		Parents/Guardians Divorcing		
<input type="radio"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		Bereavement		
<input type="radio"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		Bullying		
<input type="radio"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		Antisocial Behaviour		
						Unable to delete record as it is linked to a pastoral record.		
<input checked="" type="radio"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		Relocation		
<input type="radio"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		Illness (Long Term)		
<input type="radio"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		Illness (Short Term)		
<input type="radio"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		Concerning Behaviour		
<input type="radio"/>		<input checked="" type="checkbox"/>		<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

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
»
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 from 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:

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:

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. 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.
5. Check the **In Use** check box is ticked to ensure that the category is live and available when pastoral management issues are recorded.
  6. (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 76](#).

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"/>

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

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

**Example:** For example, this screenshot shows a category called 'Low Priority', which is live and in use. Records in this category can be seen by all staff with

access to the **Pastoral Management** module.



**Note:** GIRFEC options are for Scottish schools and only appear if configured on your system. For more information, see "[Configuring GIRFEC](#)" on page 76.

3. When you have finished viewing the category, do ONE of the following:
  - » 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.
  - » Click **Pastoral Management Dashboard** to go to the **Pastoral Management** dashboard.

## 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.

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"/>





 **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 from 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.

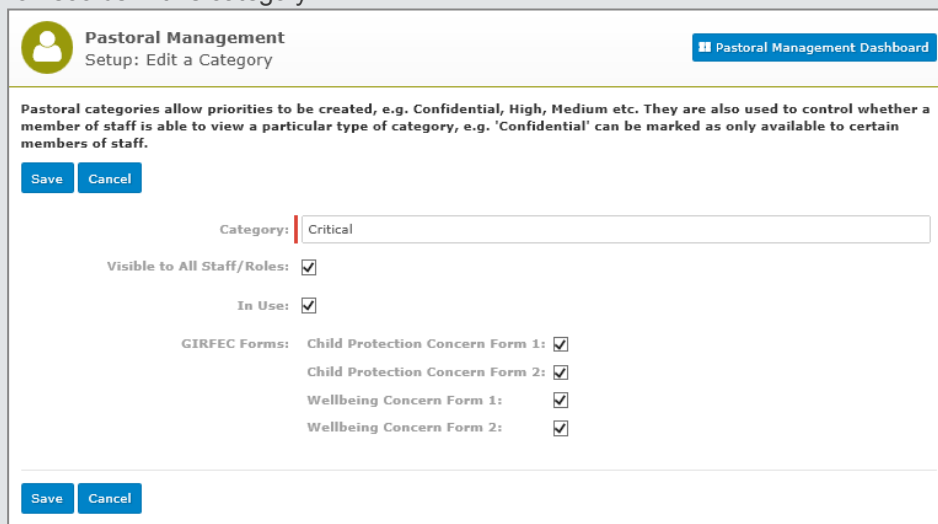
Page Size:


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:** This example shows a category called 'Critical' which is live and available for use. Records in this category can be seen by all staff with access to the **Pastoral Management** module and all available GIRFEC forms must be completed for records in this category.



 **Note:** GIRFEC options are for Scottish schools and only appear if configured on your system. For more information, see "[Configuring GIRFEC](#)" on page 76.

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.

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"/>

**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 from 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. Click next to the category you would like to delete.

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



**Example:** The following screenshot shows a category called 'Normal Priority' which is visible to all users with access to the Pastoral Management module and currently in use.

The screenshot shows the 'Pastoral Management' interface for deleting a category. The title is 'Setup: Delete a Category'. The category name is 'Normal Priority'. The 'Visible to All Staff/Roles' checkbox is checked, and the 'In Use' checkbox is also checked. There are four 'GIRFEC Forms' listed, each with an unchecked checkbox: 'Child Protection Concern Form 1', 'Child Protection Concern Form 2', 'Wellbeing Concern Form 1', and 'Wellbeing Concern Form 2'. There are 'Delete' and 'Cancel' buttons at the top and bottom of the form.

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

The screenshot shows the 'Pastoral Management' interface for deleting a category. The title is 'Setup: Delete a Category'. The category name is 'High Priority'. The 'Visible to All Staff/Roles' checkbox is checked, and the 'In Use' checkbox is also checked. There are four 'GIRFEC Forms' listed, each with an unchecked checkbox: 'Child Protection Concern Form 1', 'Child Protection Concern Form 2', 'Wellbeing Concern Form 1', and 'Wellbeing Concern Form 2'. A red error message is displayed: 'Unable to delete Category as it is linked to a Pastoral Management Record.' There are 'Delete' and 'Cancel' buttons at the top and bottom of the form.

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.

## 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.

**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 from 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
<b>Profile Name</b>	Type all or part of the name of the profile you are looking for into this field.
<b>Linked Users</b>	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.

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 from 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
<b>Profile Name</b>	Type all or part of the name of the profile you are looking for into this field.
<b>Linked Users</b>	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.

<b>Modules:</b> Pastoral / Behaviour ▼	
Configuration Set-up: <input type="checkbox"/>	Pastoral Management: 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**.

Helpline: +44 (0)1458 833 055

Telephone: +44 (0)1458 833 344

Fax: + 44 (0)1458 835297

Email: [support@wcbs.co.uk](mailto:support@wcbs.co.uk)

Website: [www.wcbs.co.uk](http://www.wcbs.co.uk)

Address:

West Country Business Systems (Holdings) Limited

Landmark House, Wirrall Park Road, Glastonbury, Somerset, BA6 9FR, UK

