

3sysACADEMIC

# Pastoral Management

## User Guide



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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

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

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# Introduction

Welcome to the 3sysACADEMIC Pastoral Management User Guide.

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

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

In addition to providing an overview of the **Pastoral Management** module, this chapter also details how to use and complete common types of field appearing in 3sysACADEMIC, such as drop lists and search dialogs.

This chapter discusses the following:

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# CHAPTER 1

## 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>?

For details, see:

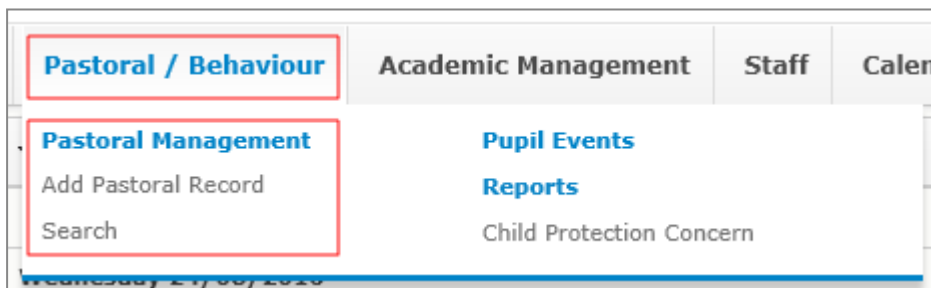
- » "[Accessing and Managing Pastoral Records](#)" below.
- » "[Configuring Pastoral Records](#)" on the facing page.
- » "[Allocating Access to Pastoral Management \(System Administrators Only\)](#)" on page 8.

## Accessing and Managing Pastoral Records

### 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.




---

<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.

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

**Pastoral Management Dashboard**

**Management**

- Add Pastoral Record
- Search
- Configuration**
- Record Reason
- Category
- GIRFEC
- Reports
- Child Protection Concern

**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 details, see:

- » "About Adding Pastoral Records" on page 24.
- » "About Maintaining Pastoral Records" on page 38.

## Configuring Pastoral Records

### HOW TO CONFIGURE PASTORAL RECORDS

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

**Pastoral Management Dashboard**

**Management**

- Add Pastoral Record
- Search
- Configuration**
- Record Reason
- Category
- GIRFEC
- Reports
- Child Protection Concern

**Requires Action By Me**

Actions	Pupil Name(s)	Raised By	Status	Heading	Action Required By	Last Modified By
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	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

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	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 details, see:

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

## Allocating Access to Pastoral Management (System Administrators Only)

### HOW TO ALLOCATE ACCESS TO PASTORAL MANAGEMENT



**Note:** Normally, these settings are configured by your System Administrator. As such, you may not be able to see this section when you log in.

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.

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 **Page** 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'.

 **Note:** To skip through the available options, click on the **Modules** drop list and press the first letter of the module you want, e.g. 'P' for 'Pastoral / Behaviour'. Press the letter repeatedly until you reach the required module.

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

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

 **Note:** Selecting a module using the **Modules** drop list causes the screen to refresh to show only permission settings relating to that module.

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**.

## 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 available.

3sysACADEMIC allows users in Scottish schools to:

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

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

You complete the GIRFEC information as part of adding and maintaining pastoral records. However, GIRFEC functionality needs to be activated on the system and access to the **Pastoral Management** module and Child Protection Concern report allocated to relevant users by your System Administrator. For details, see ["Configuring GIRFEC" on page 72](#).

GIRFEC options are associated with categories. When a category is created by your System Administrator, he/she can indicate which GIRFEC forms, if any, can be completed for this type of pastoral record. For more information about creating categories, see ["About Configuring Pastoral Management" on page 58](#).

This means that GIRFEC options appear whenever a user selects a relevant category, e.g. when adding a record via the **Add a Pastoral Record** screen or adding a note via the **Edit a Pastoral Record** screen.

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

**Pastoral Management**  
Add a Pastoral Record

[Pastoral Management Dashboard](#)

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

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

Pupil Name(s): ASHFIELD, Gem...

Record Reason(s): Antisocial Behav...

Staff Name: STRINGER, Robert

Date: 22/07/2016 10:19

Category: Critical

Show Alert Against Pupil:

Status: Open

Heading:

Overview:

Make this Record Visible to All Staff:

GIRFEC Forms: [Child Protection Concern Form 1](#) [Wellbeing Concern Form 1](#)  
[Child Protection Concern Form 2](#) [Wellbeing Concern Form 2](#)

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

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

Category: Critical

Heading: Aggressive Behaviour

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

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

Make this Note Visible to All Staff:

Action Required:

GIRFEC Forms: [Child Protection Concern Form 1](#) [Wellbeing Concern Form 1](#)  
[Child Protection Concern Form 2](#) [Wellbeing Concern Form 2](#)

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

[Save](#)

For more information, see:

- » ["About Adding Pastoral Records" on page 24.](#)
- » ["About Maintaining Pastoral Records" on page 38.](#)

## Completing Fields

To add information to records in 3sysACADEMIC, you need to complete the fields on the relevant screens. To make the software user-friendly, functionalities are replicated across the program so that once you learn how to complete one section, you will find you also know how to complete many others.

**Example:** Drop lists and search options are often used to complete fields in 3sysACADEMIC.

For your convenience, how to add some of the most frequently required data is detailed in this section. Some procedures provide generic information that can be applied to many different fields, while others explain how to use specific dialogs and popups that can be found in the software.

Field types covered include:

- » Drop lists. See ["Using Drop Lists and Auto Complete" on the facing page](#).
- » Search dialogs. See ["Using Search Dialogs" on page 15](#).

Data types covered include:

- » Dates. See ["Using Calendar Fields and Popups" on the facing page](#).
- » Dates and times. See ["Using Calendar and Time Popups" on page 14](#).
- » Individual pupil's names. See ["Retrieving a Pupil's Name" on page 16](#).
- » Multiple pupils' names. See ["Retrieving Multiple Pupils' Names" on page 17](#).
- » Individual staff member's names. See ["Retrieving a Staff Member's Name" on page 19](#).
- » Multiple staff members' names. See ["Retrieving Multiple Staff Members' Names" on page 20](#).
- » File attachments. See ["Attaching Files to 3sysACADEMIC Records" on page 22](#).



**Note:** Search options are tailored to the data they retrieve. As such, there are separate but similar search options for retrieving one staff or pupil name or several staff or pupil names, as well as separate popups depending upon whether you are adding just a date or a date with a time.



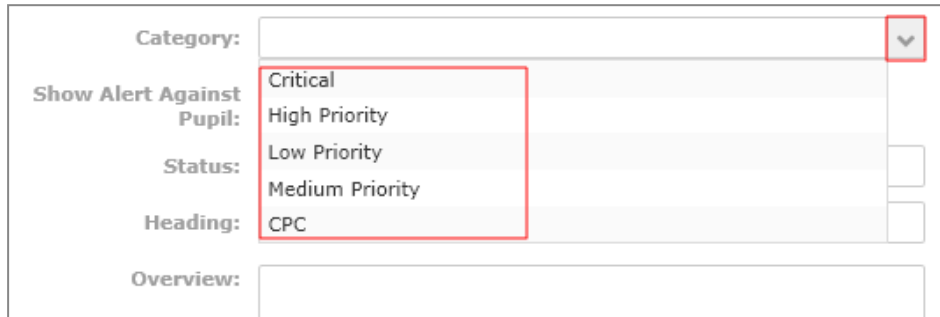
**Note:** For more information about how to use the software, click **Help** at the top of any 3sysACADEMIC screen to access the *3sysACADEMIC Online Help*.


## Using Drop Lists and Auto Complete

### HOW TO USE A DROP LIST OR AUTO COMPLETE

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

- » Click  and click on an option in the list that appears.



Category:  

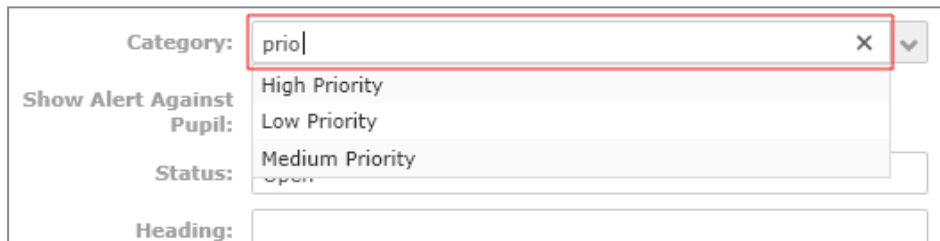
Show Alert Against Pupil:


Status:

Heading:

Overview:

- » 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.



Category:  

Show Alert Against Pupil:

Status:

Heading:







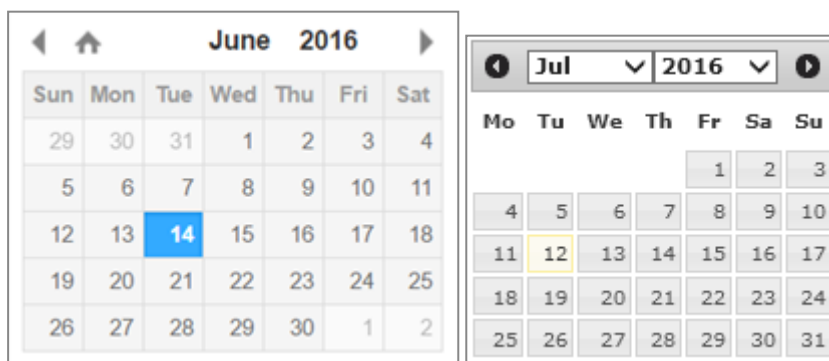
**Note:** The auto complete functionality is available in the following module: **Pastoral Management**. (In the future it will be available for all relevant modules.)

## Using Calendar Fields and Popups

### HOW TO USE A CALENDAR FIELD OR POPUP

Do ONE of the following:

- » Click in the field and click  to delete the existing date. Type the required date in the field using the format DD/MM/YYYY.
- » Click  or  to display the **Calendar** popup and select your preferred date. (To go to other months use the arrows in the top left and right-hand corners of the calendar OR use the month and year drop lists. To return to the current month, click .)



June 2016

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	1	2


Jul 2016

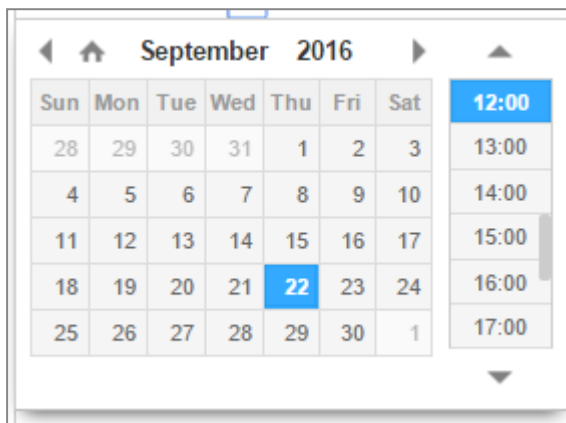
Mo	Tu	We	Th	Fr	Sa	Su
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

## Using Calendar and Time Popups

### HOW TO USE A CALENDAR AND TIME POPUP

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.)



## Using Search Dialogs

### HOW TO USE A SEARCH DIALOG

1. Click  or  at the end of the relevant field.



**Note:** You can also use auto complete to fill a field with an associated search dialog in newer modules/functions.

The relevant search dialog appears.

**Example:** This example shows a **Subject Search** dialog.

The screenshot shows a 'Subject Search' dialog box. At the top, there is a title bar with the text 'Subject Search' and a close button (an 'x' in a square). Below the title bar is a text input field with the label 'Subject' to its left. Below the input field is a blue 'Search' button. Below the 'Search' button is a list area with a header 'Subject' and a 'Cancel' button at the bottom right.

2. Enter your search criteria in the field(s) at the top of the dialog to narrow down the list of results.
3. Click **Search**.



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

4. Click on the option you want in the list that appears.

The previous screen reappears with your selection in the relevant field.

For details of how to search for pupil and staff names, see "[Retrieving a Pupil's Name](#)" on the next page, "[Retrieving Multiple Pupils' Names](#)" on page 17, "[Retrieving a Staff Member's Name](#)" on page 19 and "[Retrieving Multiple Staff Members' Names](#)" on page 20.

## Retrieving a Pupil's Name

### HOW TO RETRIEVE A PUPIL'S NAME

Do ONE of the following:

- » Click in the field and type all or part of the name you require. Select your choice from the options that appear in the drop list. This is known as auto complete.
- » Click  at the end of the field to search for the required name. A **Pupil Search** dialog appears.

**Pupil Search**
✕

Group

Pupil Name

Pupil Name	Pupil Code	Form

- 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.
- » **Name** - Type all or part of the pupil's name in the **Pupil 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 pupil record entered in the relevant field.



## Retrieving Multiple Pupils' Names

### HOW TO RETRIEVE MULTIPLE PUPILS' NAMES

- » Click in the relevant field and type the first letters of the name 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 selected all the names you require.
- » Click  at the end of the field to search for the required record. A **Pupil Search** dialog appears.


**Pupil Search** 

Group

Pupil Name

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

- 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.
  - » **Name** - Type all or part of the pupil's name in the **Pupil Name** field.

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

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

- b. Click on each individual you require in the left-hand, **Available** column to move them to the right-hand, **Selected** column.

**Pupil Search**

Group

Pupil Name

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

13 result(s)



**Note:** To deselect a name, click on the  next to the relevant name in the right-hand, **Selected** column.

- c. 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.

## Retrieving a Staff Member's Name

### HOW TO RETRIEVE A STAFF MEMBER'S NAME

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 options that appear in the drop list. This is known as auto complete. For example:

A screenshot of a web form. The label 'Staff Name:' is followed by a text input field 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.

A screenshot of a 'Staff Search' dialog box. At the top, there are two 'Group' dropdown menus, both set to 'Please Select'. Below them is a 'Staff Type' dropdown menu, also set to 'Please Select'. A 'Staff Name' text input field is empty. A blue 'Search' button is positioned below the input field. At the bottom right of the dialog is a blue 'Cancel' button. Below the search fields is a table with two columns: 'Staff Name' and 'Staff Code'. The table is currently empty.

- 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 a 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 in the list that appears.

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

## Retrieving Multiple Staff Members' Names

### HOW TO RETRIEVE MULTIPLE STAFF MEMBERS' NAMES

- » Click in the relevant field and type all or part of the name 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.

<b>Staff Name:</b>	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. '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 a staff member's name in the **Staff Name** field.



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

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

- b. Click on each individual you require in the left-hand, **Available** column to move them to the right-hand, **Selected** column.

**Staff Search** ✕

Group

Staff Type

Staff Name

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)

**Note:** To deselect a name, click on the next to the relevant name in the right-hand, **Selected** column.

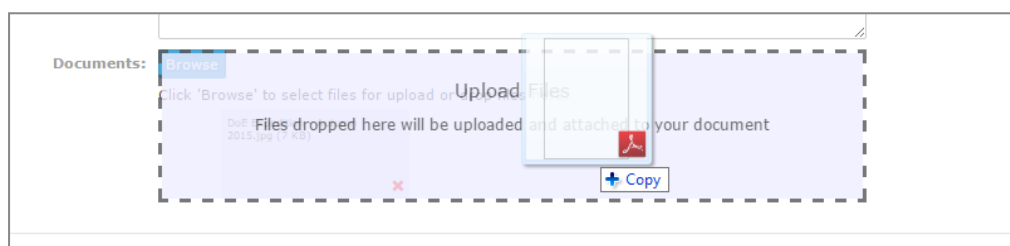
- c. Repeat the search process until you have found and moved all the names you need into the right-hand column listing selected staff. When you are finished, click **OK**. You return to the previous screen with the staff name(s) added to the relevant field.

## Attaching Files to 3sysACADEMIC Records

### HOW TO ATTACH FILES TO 3sysACADEMIC RECORDS

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.

# Adding Pastoral Records

This chapter discusses the following:

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# CHAPTER 2

## About Adding Pastoral Records

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

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

Pastoral care often requires a range of staff to undertake roles to help and support pupils. The **Pastoral Management** module helps you manage specific, allocated tasks through **Actions**. Added as part of a note, actions include a summary of the task that must be completed and are assigned to staff with a deadline. A list of actions 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
<input type="checkbox"/> <input type="checkbox"/>	DAVIS Laura, DAVIS Steven	STRINGER, Robert	Open	Davis Divorce	04/07/2016	30/06/2016, STRINGER, Robert
<input type="checkbox"/> <input type="checkbox"/>	CAVENDISH Mary, KERR Rebecca	STRINGER, Robert	Open	Allegation of Bullying	01/07/2016	30/06/2016, STRINGER, Robert
<input type="checkbox"/> <input type="checkbox"/>	ALLAN Tom, ALTON Benjamin, BELL Edward, BURTON James, DAVIES John	STRINGER, Robert	Open	Fighting at Lunchtime	01/07/2016	30/06/2016, STRINGER, Robert
<input type="checkbox"/> <input type="checkbox"/>	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
<input type="checkbox"/> <input type="checkbox"/>	DAVIS Laura, DAVIS Steven	Open	Davis Divorce	22/07/2016 11:10:00	22/07/2016, STRINGER, Robert
<input type="checkbox"/> <input type="checkbox"/>	ADAMS Lauren S, ADAMS Sarah J, ALEXANDER-GUTHERIDGE Rachel	Open	CPC	12/07/2016 10:31:00	12/07/2016, BRVANT, Melanie
<input type="checkbox"/> <input type="checkbox"/>	DUNCAN Katherine	Open	Unusual Behaviour	12/07/2016 09:31:00	12/07/2016, STRINGER, Robert
<input type="checkbox"/> <input type="checkbox"/>	ADAMS Sarah J	Open	Allegations of Stealing	08/07/2016 09:20:00	08/07/2016, STRINGER, Robert
<input type="checkbox"/> <input type="checkbox"/>	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
<input type="checkbox"/> <input type="checkbox"/>	DAVIS Laura, DAVIS Steven	STRINGER, Robert	Open	Davis Divorce	04/07/2016	30/06/2016, STRINGER, Robert
<input type="checkbox"/> <input type="checkbox"/>	CAVENDISH Mary, KERR Rebecca	STRINGER, Robert	Open	Allegation of Bullying	01/07/2016	30/06/2016, STRINGER, Robert
<input type="checkbox"/> <input type="checkbox"/>	ALLAN Tom, ALTON Benjamin, BELL Edward, BURTON James, DAVIES John	STRINGER, Robert	Open	Fighting at Lunchtime	01/07/2016	30/06/2016, STRINGER, Robert
<input type="checkbox"/> <input type="checkbox"/>	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
<input type="checkbox"/> <input type="checkbox"/>	DAVIS Laura, DAVIS Steven	Open	Davis Divorce	22/07/2016 11:10:00	22/07/2016, STRINGER, Robert
<input type="checkbox"/> <input type="checkbox"/>	ADAMS Lauren S, ADAMS Sarah J, ALEXANDER-GUTHERIDGE Rachel	Open	CPC	12/07/2016 10:31:00	12/07/2016, BRVANT, Melanie
<input type="checkbox"/> <input type="checkbox"/>	DUNCAN Katherine	Open	Unusual Behaviour	12/07/2016 09:31:00	12/07/2016, STRINGER, Robert
<input type="checkbox"/> <input type="checkbox"/>	ADAMS Sarah J	Open	Allegations of Stealing	08/07/2016 09:20:00	08/07/2016, STRINGER, Robert
<input type="checkbox"/> <input type="checkbox"/>	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 31.
- » "About Maintaining Pastoral Records" on page 38.



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.

**Pastoral Management**  
Add a Pastoral Record Pastoral Management Dashboard

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

Save Cancel

Pupil Name(s):

Record Reason(s):

Staff Names:

Date:

Category:

Status:

Heading:

Overview:

Make this Record Visible to All Staff:

Make this Record Visible to Specific Staff/Roles:

Documents:

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

Save Cancel

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

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

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

**More details:** If you are unsure how to add one or more pupil name(s) to this field, see ["Retrieving Multiple Pupils' Names" on page 17](#).

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

More details...

To select a reason, do ONE of the following:

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

The screenshot shows a dialog box titled "Record Reason Search". At the top right is a close button (X). Below the title bar is a text input field labeled "Description". Below the input field is a blue "Search" button. Below the search area is a table with two columns, both labeled "Description". The table is currently empty. At the bottom right of the dialog are two buttons: "OK" and "Cancel".

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

d. Click **OK**.

Description	Description
Bereavement	Parents/Guardians Divorcing
Bullying	
Antisocial Behaviour	
Relocation	
Illness (Long Term)	
Illness (Short Term)	

4. Change the reporting member of staff, if required, using auto complete or the search option, accessed via . (The logged in user appears automatically.)

**More details:** If you are unsure how to add a staff member's name to this field, see ["Retrieving a Staff Member's Name" on page 19](#).

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

**More details:** If you are unsure how to add a date and time to this field, see ["Using Calendar and Time Popups" on page 14](#).

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

**More details:** For details of how to use drop lists and auto complete, see ["Using Drop Lists and Auto Complete" on page 13](#).



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

**Pupil Search**

View: Standard [Add Copy](#)

▸ **Refine Search**

**Pupils** [Add](#) [Add Event](#) [Create Pupil Custom Group](#) [Email](#) [Add Pupil Document](#)

Pupil Events ▾ More Actions ▾

Actions	<input type="checkbox"/> Code ▾	Name		Preferred name	Form	Leaving date
View Edit ▾	<input type="checkbox"/> ADA001	ADAMS, Lauren S	<span style="color: blue;">●</span>	Lauren	Form 11A	
View Edit ▾	<input type="checkbox"/> ADA003	ADAMS, Sarah J	<span style="color: blue;">●</span>	Sarah	Form 7A	
View Edit ▾	<input type="checkbox"/> ALL001	ALLAN, Samantha E		Sam	Upper Sixth	
View Edit ▾	<input type="checkbox"/> ALL002	ALLAN, Tom	<span style="color: orange;">■</span>	Tom	Upper Sixth	
View Edit ▾	<input type="checkbox"/> ALL100	ALLEN, David		David	Form 4B	
View Edit ▾	<input type="checkbox"/> ALTO10	ALTON, Benjamin	<span style="color: pink;">★</span>	Ben	Form 1A	
View Edit ▾	<input type="checkbox"/> ASH001	ASHMAN, Timothy George		Timothy	Form 11A	
View Edit ▾	<input type="checkbox"/> ASH003	ASHFIELD, Gemma Frances		Gemma	Form 9A	
View Edit ▾	<input type="checkbox"/> ASL001	ASLETT, Fletcher	<span style="color: green;">■</span>	Fletcher	Form 9A	
View Edit ▾	<input type="checkbox"/> BAI001	BATES, Karen Jane		Karen	Upper Sixth	



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

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

**Pastoral Management** [Add a Pastoral Record](#) [Pastoral Management Dashboard](#)

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

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

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

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

Staff Name: STRINGER, Robert

Date: 22/07/2016 11:10

Category: High Priority

Show Alert Against Pupil:

Status: Open

Heading:

Overview:

Make this Record Visible to All Staff:

Documents: [Browse](#)

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

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

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

8. Type relevant information into the **Heading** and **Overview** fields.
9. To set the record's visibility, do ONE of the following:
  - » To make the record visible to all staff, tick the **Make this Record Visible to All Staff** check box.
  - » To make the record visible to selected staff only, add the name(s) of relevant staff to the **Make this Record Visible to Specific Staff/Roles** field using auto complete or the search option, accessed via .

**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:** If you are unsure how to add one or more staff member's name(s) to this field, see "[Retrieving Multiple Staff Members' Names](#)" on page 20.

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:** 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(s): STRINGER, Robert

Date: 22/07/2016 10:19

Category: Critical

Show Alert Against Pupil:

Status: Open

Heading:

Overview:

Make this Record Visible to All Staff:

GIRFEC Forms: Child Protection Concern Form 1 Wellbeing Concern Form 1  
Child Protection Concern Form 2 Wellbeing Concern Form 2

Documents: Browse

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

Save Cancel

**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.

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

**More details:** For more about how to attach files to records, see ["Attaching Files to 3sysACADEMIC Records"](#) on page 22.

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

**Pastoral Management**  
Add a Pastoral Record

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

Save Cancel

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

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

Staff Name: STRINGER, Robert

Date: 22/07/2016 11:10

Category: High Priority

Show Alert Against Pupil:

Status: Open

Heading: Davis Divorce

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

Make this Record Visible to All Staff:

Documents: Browse

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

Letter from Mr and Mrs Davis\_30-06-2016.pdf (79 KB)

PDF

Save Cancel

- Click **Save**.

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

**Notes**

Pupil Name: [dropdown]

Child Protection Concern Form 1: [dropdown]

Child Protection Concern Form 2: [dropdown]

Wellbeing Concern Form 1: [dropdown]

Wellbeing Concern Form 2: [dropdown]

Add Search Reset

Sort Descending Sort Ascending

- (Optional) Add notes to the record. For more information, see ["Adding Pastoral Record Notes"](#) on the facing page.

## 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.

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, BOUILLON 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 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.



- 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.

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



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

- Type a heading for the note in the **Heading** field and more information in the **Note** field.
- (Optional) Remove unrelated pupils from the **Pupil Name(s)** field, if required, e.g. if several pupils were involved in an incident, but the note only applies to some of them.
- To set the note's visibility, do **ONE** of the following:
  - » To make the note visible to all staff, tick the **Make this Note Visible to All Staff** check box.
  - » To make the note visible to selected staff only, add the name(s) of relevant staff to the **Make this Note Visible to Specific Staff/Roles** field using auto complete or the search option, accessed via

**More details:** If you are unsure how to complete this step, see "[Completing Fields](#)" on page 12.

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:	<input checked="" type="checkbox"/>
Action Summary:	<input type="text"/>
Action By Date:	<input type="text" value="23/07/2016 11:47"/>
Action By:	<input type="text"/>

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

**More details:** If you are unsure how to add a date and time to this field, see "[Using Calendar and Time Popups](#)" on page 14.



**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**.

For more information, see "[About GIRFEC](#)" on page 10.



**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, by browsing and selecting files or dragging and dropping from a separate window.

**More details:** For more about how to attach files to records, see "[Attaching Files to 3sysACADEMIC Records](#)" on page 22.

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.

**Message from webpage** ✕



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

BAKER, Molly B  
WRIGHT, Diana

OK
Cancel

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

# CHAPTER 3

## Maintaining Pastoral Records

This chapter discusses the following:

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Viewing Pastoral Record Notes .....	43
Viewing and Printing GIRFEC Forms (Scottish Schools Only) .....	45
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Accessing the Child Protection Concern Report (Scottish Schools Only) .....	53
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## About 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 "[About Configuring Pastoral Management](#)" on page 58.

As well as being able to update records, users with appropriate access can augment them by adding **Notes** with further information or more recent developments. In addition, **Actions** can be added and assigned to staff as part of a note. See "[Adding Pastoral Record Notes](#)" on page 31 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:  Wellbeing Concern Form 1:

Child Protection Concern Form 2:  Wellbeing Concern Form 2:

**Absence Arrangements**

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

Category:

Note: Mr and Mrs Davis wish to remove Steven and Laura from school for a few days next week (4 - 8/06/2016). Arrangements should be made so that this does not impact their studies.

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

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

Action Note:

Action By: STRINGER, Robert

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

Page Size:      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**  
[Add Pastoral Record](#)  
[Search](#)  
**Configuration**  
[Record Reason](#)  
[Category](#)  
**GIRFEC**  
**Reports**  
[Child Protection Concern](#)

**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, as shown in the screenshot below.

**Absence Arrangements** [Edit](#)

STRINGER, Robert (22 July 2016)

Category: High Priority

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

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

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

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

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

For more information about how to complete pastoral management tasks, see:

- » ["Viewing Pastoral Records" on the next page.](#)
- » ["Viewing and Printing GIRFEC Forms \(Scottish Schools Only\)" on page 45.](#)
- » ["About Maintaining Pastoral Records" on the previous page.](#)
- » ["Editing Pastoral Records" on page 47 \(including how to add GIRFEC forms\).](#)
- » ["Editing Pastoral Record Notes" on page 48 \(including how to edit GIRFEC forms\).](#)
- » ["Marking Pastoral Record Actions 'Complete'" on page 50.](#)
- » ["Accessing the Child Protection Concern Report \(Scottish Schools Only\)" on page 53.](#)
- » ["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 the **Pastoral Management** dashboard OR the **Pastoral Record Search** screen:

- » 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																																																															
<table border="1"> <thead> <tr> <th colspan="8">Requires Action By Me</th> </tr> <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> <th></th> </tr> </thead> <tbody> <tr> <td></td> <td>DAVIS Laura, DAVIS Steven</td> <td>STRINGER, Robert</td> <td>Open</td> <td>Davis Divorce</td> <td>04/07/2016</td> <td>30/06/2016, STRINGER, Robert</td> <td></td> </tr> <tr> <td></td> <td>CAVENDISH 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> <td></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> <td></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> <td></td> </tr> </tbody> </table>								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									
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**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 **Page** 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 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.

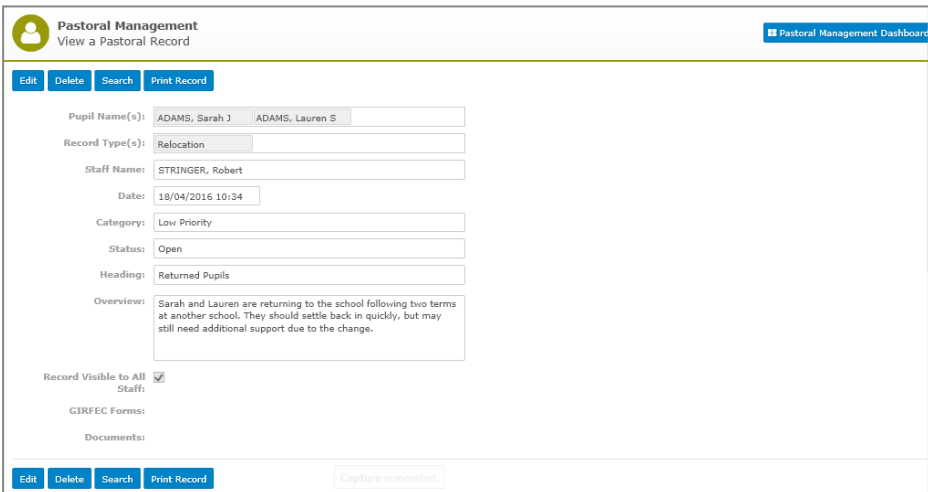
» Click  to go to the first page or  to go to the last page.

» Use the **Page Size** options to see more records on each page.

Page Size:

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

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



**Pastoral Management**  
View a Pastoral Record

**Edit Delete Search Print Record**

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

Record Type(s): Relocation

Staff Name: STRINGER, Robert

Date: 18/04/2016 10:34

Category: Low Priority

Status: Open

Heading: Returned Pupils

Overview: Sarah and Lauren are returning to the school following two terms at another school. They should settle back in quickly, but may still need additional support due to the change.

Record Visible to All Staff:

GIRFEC Forms:

Documents:

**Edit Delete Search Print Record**

3. (Optional) Do ONE of the following:

- » Click **Edit** to amend the record. For more details, see "[Editing Pastoral Records](#)" on page 47.
- » 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 Pastoral Record Notes

### HOW TO VIEW A PASTORAL RECORD NOTE

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

**More details:** If you are unsure how find a record, see step 1 of "[Viewing Pastoral Records](#)" on page 40.

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

**More details...**

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

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

Field	Action
<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.



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

- 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.

- e. (Optional) Use the **Page** icons beneath the notes 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.

4. Do ONE of the following:

- » Click **Reset** to remove the current search criteria and undertake a new search.
- » Click **Edit** to amend the record. For more details, see ["Editing Pastoral Records" on page 47](#) or ["Editing Pastoral Record Notes" on page 48](#).



**Note:** Security relating to pastoral 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.

- » 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 and Printing GIRFEC Forms (Scottish Schools Only)

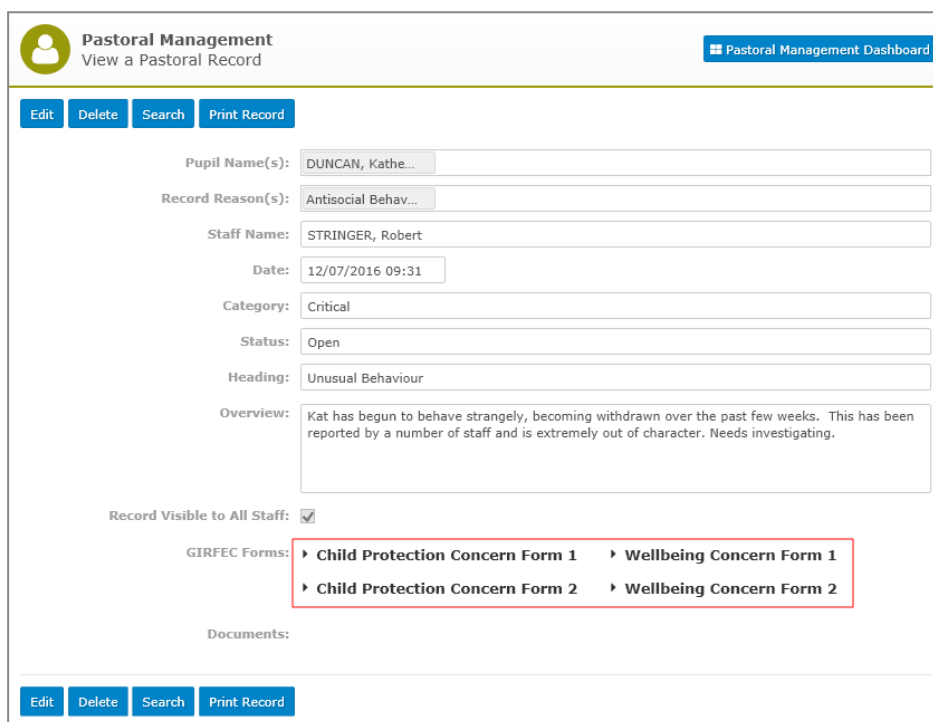
### HOW TO VIEW AND PRINT A GIRFEC FORM (SCOTTISH SCHOOLS ONLY)

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

**More details:** If you are unsure how find a record, see step 1 of "Viewing Pastoral Records" on page 40.

2. Click  next to the relevant record.

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



**Pastoral Management**  
View a Pastoral Record

[Pastoral Management Dashboard](#)

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

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

Record Reason(s): Antisocial Behav...

Staff Name: STRINGER, Robert

Date: 12/07/2016 09:31

Category: Critical

Status: Open

Heading: Unusual Behaviour

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

Record Visible to All Staff:

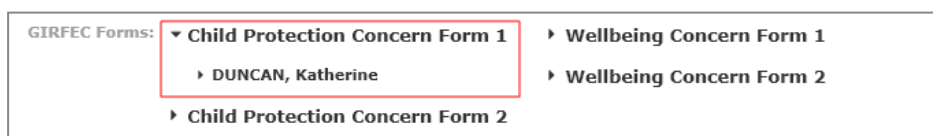
GIRFEC Forms: **Child Protection Concern Form 1** **Wellbeing Concern Form 1**  
**Child Protection Concern Form 2** **Wellbeing Concern Form 2**

Documents:

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

3. Click on the name of the GIRFEC form you would like to view.

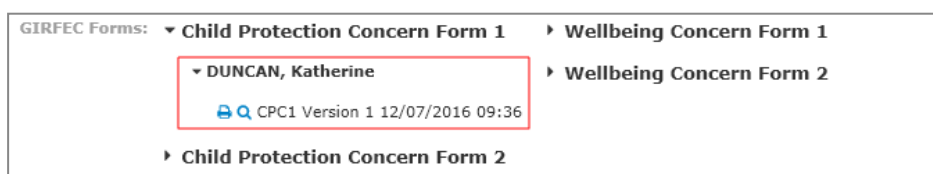
The text expands to show a list of pupils that forms have been completed for.




GIRFEC Forms: **Child Protection Concern Form 1** **Wellbeing Concern Form 1**  
**DUNCAN, Katherine** **Wellbeing Concern Form 2**  
**Child Protection Concern Form 2**

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** **Wellbeing Concern Form 1**  
**DUNCAN, Katherine** **Wellbeing Concern Form 2**  
 **CPC1 Version 1 12/07/2016 09:36**  
**Child Protection Concern Form 2**

5. Do ONE of the following:

» To view a form:

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

» To print a form:

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

## Editing Pastoral Records

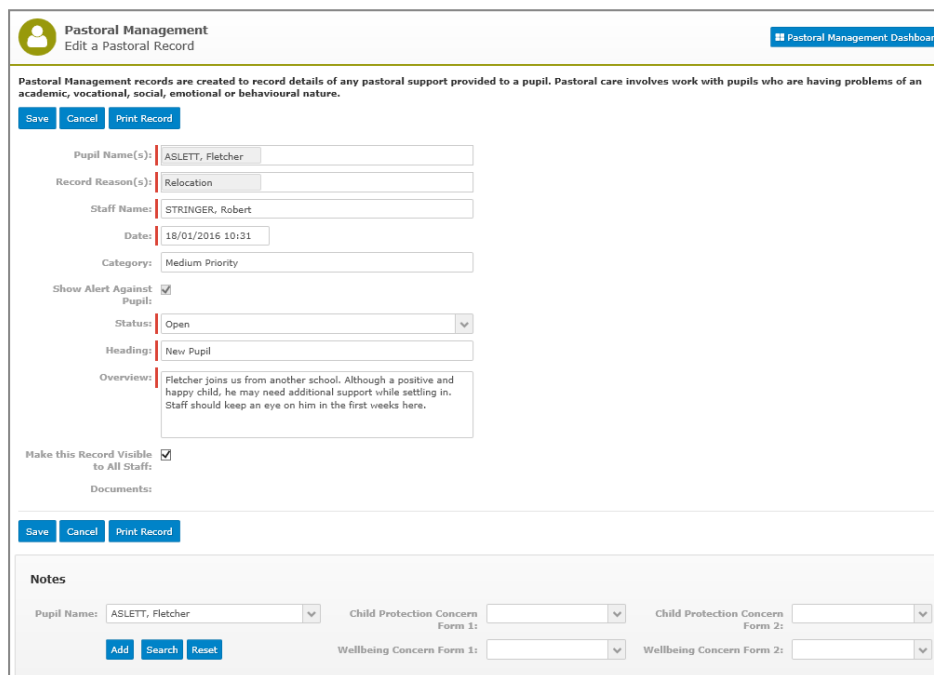
### HOW TO EDIT A PASTORAL RECORD

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

**More details:** If you are unsure how find a record, see step 1 of "[Viewing Pastoral Records](#)" on page 40.

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

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



**Pastoral Management**  
Edit a Pastoral Record

**Pastoral Management Dashboard**

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

Save Cancel Print Record

Pupil Name(s): ASLETT, Fletcher  
Record Reason(s): Relocation  
Staff Name: STRINGER, Robert  
Date: 18/01/2016 10:31  
Category: Medium Priority

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

Make this Record Visible to All Staff:   
Documents:

Save Cancel Print Record

**Notes**

Pupil Name: ASLETT, Fletcher  
Child Protection Concern Form 1:   
Child Protection Concern Form 2:   
Wellbeing Concern Form 1:   
Wellbeing Concern Form 2:   
Add Search Reset

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.
- » **Documents.**



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

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

## Editing Pastoral Record Notes

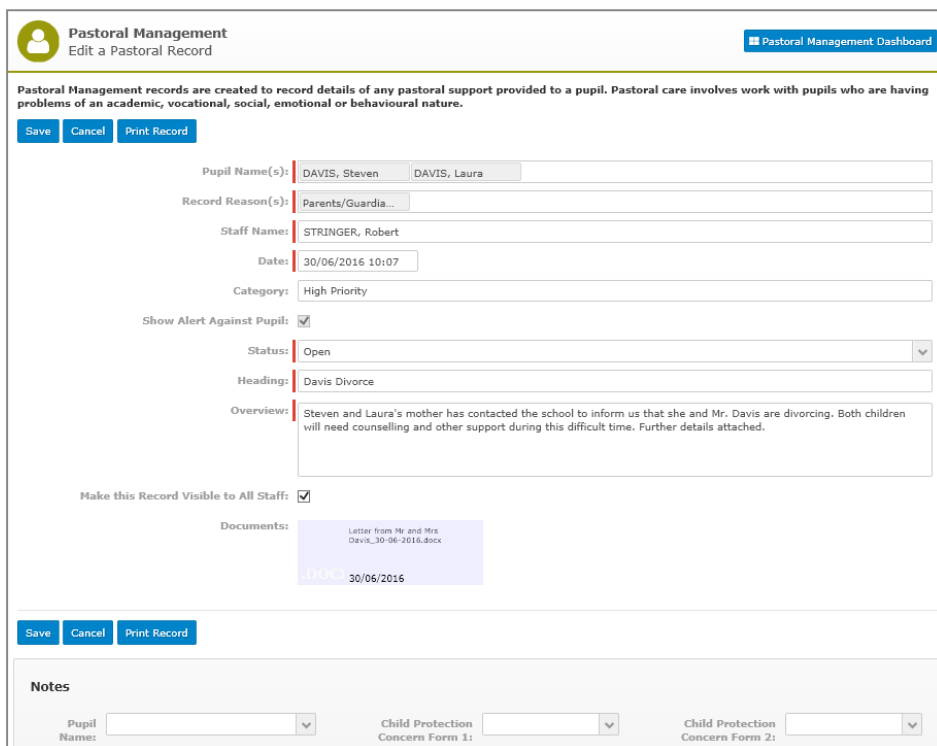
### HOW TO EDIT A PASTORAL RECORD NOTE

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

**More details:** If you are unsure how find a record, see step 1 of "[Viewing Pastoral Records](#)" on page 40.

2. Click  next to the relevant record.

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



**Pastoral Management**  
Edit a Pastoral Record

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

Save Cancel Print Record

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

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

Staff Name: STRINGER, Robert

Date: 30/06/2016 10:07

Category: High Priority

Show Alert Against Pupil:

Status: Open

Heading: Davis Divorce

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

Make this Record Visible to All Staff:

Documents: Letter from Mr and Mrs Davis\_30-06-2016.docx  
DOCX 30/06/2016

Save Cancel Print Record

**Notes**

Pupil Name: Child Protection Concern Form 1: Child Protection Concern Form 2:

3. Find the note you would like to amend.

More details...

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




**Notes**

Pupil Name: Child Protection Concern Form 1: Child Protection Concern Form 2:

Add Search Reset


Wellbeing Concern Form 1: Wellbeing Concern Form 2:

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

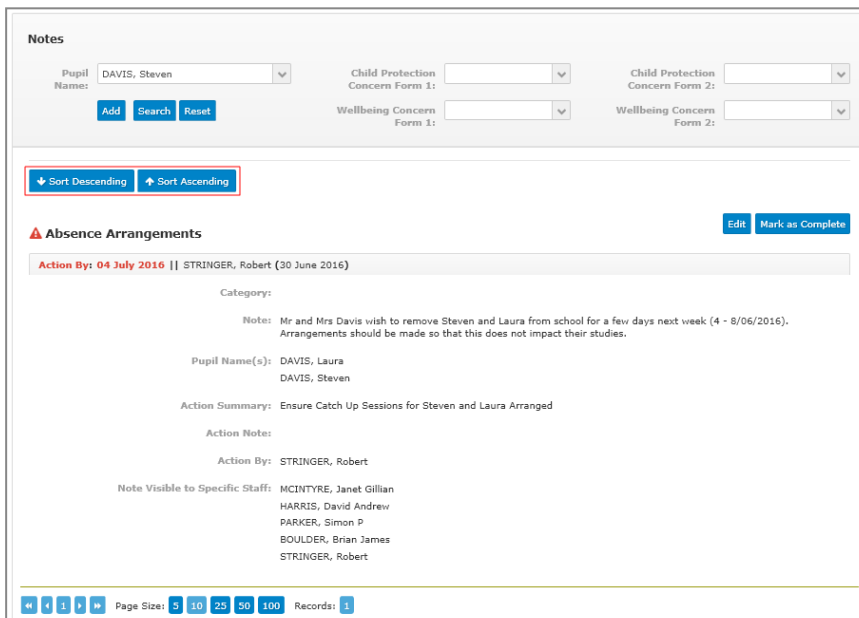
Field	Action
<b>Pupil Name</b>	Type all or part of the pupil's name into this field OR click  to select from the drop list. Click on your choice in the list that appears.



Field	Action
Child Protection Concern Form 1 / Child Protection Concern Form 2 / Wellbeing Concern Form 1 / Wellbeing Concern Form 2	(Scottish Schools Only) Use a drop list to select a GIRFEC form to search by.

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





- 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.



The screenshot shows the 'Notes' section of the software. At the top, there are search filters for 'Pupil Name' (DAVIS, Steven), 'Child Protection Concern Form 1' and '2', and 'Wellbeing Concern Form 1' and '2'. Below these are 'Add', 'Search', and 'Reset' buttons. A sorting section shows 'Sort Descending' and 'Sort Ascending' buttons. An 'Absence Arrangements' section is highlighted, with an 'Edit' and 'Mark as Complete' button. The note details include:
 


- Action By: 04 July 2016 || STRINGER, Robert (30 June 2016)
- Category:
- Note: Mr and Mrs Davis wish to remove Steven and Laura from school for a few days next week (4 - 8/06/2016). Arrangements should be made so that this does not impact their studies.
- Pupil Name(s): DAVIS, Laura; DAVIS, Steven
- Action Summary: Ensure Catch Up Sessions for Steven and Laura Arranged
- Action Note:
- Action By: STRINGER, Robert
- Note Visible to Specific Staff: MCINTYRE, Janet Gillian; HARRIS, David Andrew; PARKER, Simon P; BOULDER, Brian James; STRINGER, Robert


 At the bottom, there are navigation icons and a 'Page Size' dropdown set to 5, with 'Records: 1'.

- e. (Optional) Use the **Page** icons beneath the notes 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.

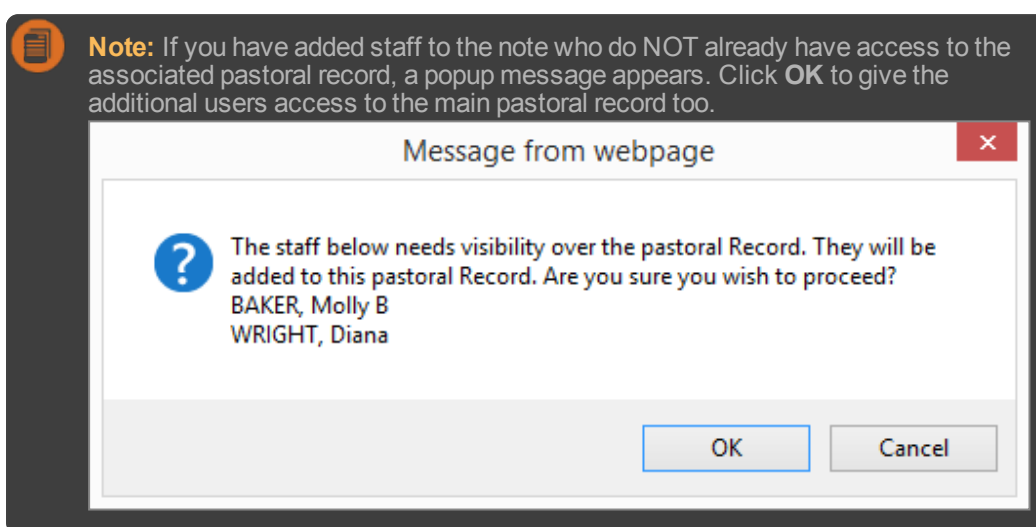
Page Size:

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 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 the **Pastoral Management** dashboard OR the **Pastoral Record Search** screen.

**More details:** If you are unsure how find a record, see step 1 of "[Viewing Pastoral Records](#)" on page 40.

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

**Pastoral Management**  
Edit a Pastoral Record

[Pastoral Management Dashboard](#)

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

[Save](#) [Cancel](#) [Print Record](#)

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

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

Staff Name: STRINGER, Robert

Date: 30/06/2016 10:07

Category: High Priority

Show Alert Against Pupil:

Status: Open

Heading: Davis Divorce

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

Make this Record Visible to All Staff:

Documents: Letter from Mr and Mrs Davis\_30-06-2016.docx  
30/06/2016

[Save](#) [Cancel](#) [Print Record](#)

**Notes**

Pupil Name:

Child Protection Concern Form 1:

Child Protection Concern Form 2:

3. Find the note to which the action relates.

More details...

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

**Notes**

Pupil Name:

Child Protection Concern Form 1:

Child Protection Concern Form 2:


Wellbeing Concern Form 1:

Wellbeing Concern Form 2:

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

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="text"/> 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.

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

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.

The screenshot shows the 'Notes' section of the software. At the top, there are search filters for 'Pupil Name' (set to 'DAVIS, Steven'), 'Child Protection Concern Form 1' and '2', and 'Wellbeing Concern Form 1' and '2'. Below these are 'Add', 'Search', and 'Reset' buttons. A sorting menu is highlighted with a red box, showing 'Sort Descending' and 'Sort Ascending' options. Below the sorting menu are 'Edit' and 'Mark as Complete' buttons. The main content area displays a note titled 'Absence Arrangements' with the following details:

- Action By:** 04 July 2016 || STRINGER, Robert (30 June 2016)
- Category:**
- Note:** Mr and Mrs Davis wish to remove Steven and Laura from school for a few days next week (4 - 8/06/2016). Arrangements should be made so that this does not impact their studies.
- Pupil Name(s):** DAVIS, Laura; DAVIS, Steven
- Action Summary:** Ensure Catch Up Sessions for Steven and Laura Arranged
- Action Note:**
- Action By:** STRINGER, Robert
- Note Visible to Specific Staff:** MCINTYRE, Janet Gillian; HARRIS, David Andrew; PARKER, Simon P; BOULDER, Brian James; STRINGER, Robert

At the bottom, there are navigation icons and a 'Page Size' dropdown menu set to 5, with options for 5, 10, 25, 50, and 100. A 'Records: 1' indicator is also present.

- e. (Optional) Use the **Page** icons beneath the notes 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:

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

This screenshot shows the same 'Absence Arrangements' note entry as in the previous screenshot, but with the 'Mark as Complete' button highlighted with a red box. The note details are:

- 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.

**✓ 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

## Accessing the Child Protection Concern Report (Scottish Schools Only)

### HOW TO ACCESS THE CHILD PROTECTION CONCERN REPORT

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

The screenshot shows a navigation menu with 'Pastoral / Behaviour' highlighted. A dropdown menu is open, showing 'Pastoral Management' and 'Pupil Events'. Under 'Pastoral Management', there is an 'Add Pastoral Record' button and a 'Search' field. Under 'Pupil Events', there is a 'Reports' button, which is further highlighted with a red box, and a 'Child Protection Concern' link below it.

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.

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

<input type="checkbox"/>	Year & F...	Date of B...	Date Refer...	Date Concern P
Sar		002	08/07/2016	
Sar				

Sort Ascending

Sort Descending

**Columns** ▶

Filter ▶

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

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

<input type="checkbox"/>	Year & F...	Date of B...	Date Refer...	Date C
ar		002	08/07/2016	
ar				

Sort Ascending

Sort Descending

Columns ▶

**Filter** ▶

Show items with value that:


Is equal to ▼

And ▼


Is equal to ▼

**Filter** **Clear**

More details...

- a. Click  next to the column heading you would like to filter by and click **Filter** in the menu that appears.
  - b. In the **Filter** popup, use the first drop list to select how the field contents should relate to your filter criterion, e.g. 'Is equal to', 'Starts with', 'Contains', 'Is null' or 'Is empty'.
  - c. Type your filter criterion in the second field.
  - d. (Optional) To filter by two criteria:
    - » Use the second drop list to select 'And' to filter by both criteria OR select 'Or' for the software to look for either feature specified.
    - » Use the third drop list to select how the field contents should relate to your second filter criterion, e.g. 'Is equal to', 'Starts with', etc.
    - » Type your filter criteria in the bottom, empty field.
  - e. Click **Filter**.
  - f. To clear a filter, click **Clear**.
5. (Optional) Click  above the **Child Protection Concern Report** grid to export the data to MS Excel.

More details...

- a. Click .
 

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.

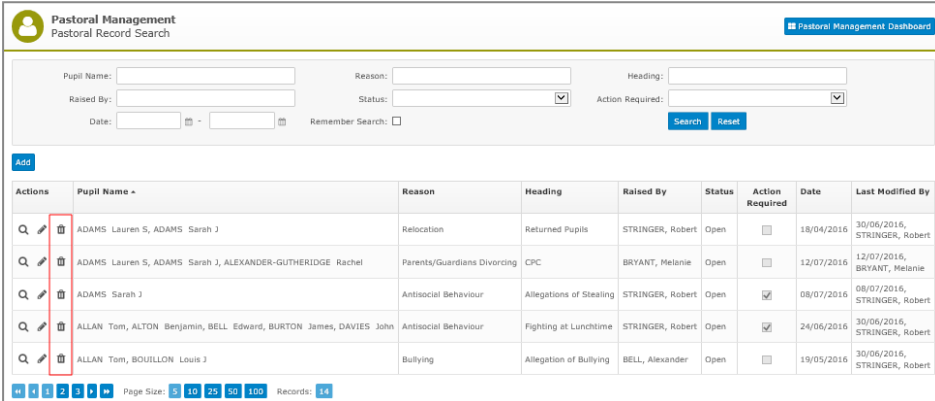
## Deleting Pastoral Records






### HOW TO DELETE A PASTORAL RECORD

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

**More details:** If you are unsure how find a record, see step 1 of "[Viewing Pastoral Records](#)" on page 40.

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

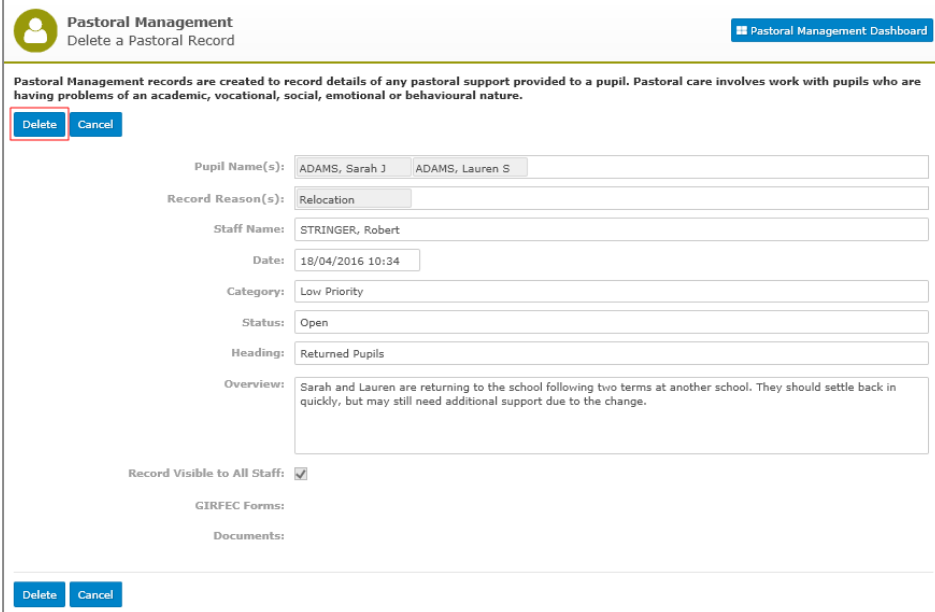


Actions	Pupil Name	Reason	Heading	Raised By	Status	Action Required	Date	Last Modified By
	ADAMS Lauren S, ADAMS Sarah J	Relocation	Returned Pupils	STRINGER, Robert	Open	<input type="checkbox"/>	18/04/2016	30/06/2016, STRINGER, Robert
	ADAMS Lauren S, ADAMS Sarah J, ALEXANDER-GUTHERIDGE Rachel	Parents/Guardians 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:** The options you see depend upon the permissions set by your System Administrator.

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



**Pastoral Management**  
Delete a Pastoral Record

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

**Delete** **Cancel**

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

Record Reason(s): Relocation

Staff Name: STRINGER, Robert

Date: 18/04/2016 10:34

Category: Low Priority

Status: Open

Heading: Returned Pupils

Overview: Sarah and Lauren are returning to the school following two terms at another school. They should settle back in quickly, but may still need additional support due to the change.

Record Visible to All Staff:

GIRFEC Forms:

Documents:

**Delete** **Cancel**

3. Click **Delete**.

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



# Configuring Pastoral Management

This chapter discusses the following:

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Allocating Access to the Child Protection Concern Report (Scottish Schools Only) .....	72

# CHAPTER 4

## About Configuring Pastoral Management

When you create a new pastoral record on the system, you give it a category and one or more record reasons.

Categories help organisations to manage staff access to pastoral records and, for Scottish schools, link records to the required GIRFEC forms.

Record reasons allow users to associate a record with one or more themes or keywords, making it easier to search for and find specific records effectively.

Your System Administrator must configure and manage the categories and record reasons to best suit your school's needs. For details, see:

- » ["Configuring Record Reasons" on the facing page.](#)
- » ["Configuring Categories" on page 63.](#)

System Administrators also allocate user access to the **Pastoral Management** module. For details, see ["Allocating Access to Pastoral Management \(System Administrators Only\)" on page 8.](#)



**Note:** Normally, these settings are configured by your System Administrator. As such, you may not be able to see this section when you log in.

## Configuring Record Reasons

One or more pastoral record reasons are added to each pastoral record when it is created. Record reasons allow schools to group records by theme, depending upon the organisation's particular preference. Record reasons might include 'Illness', 'Bereavement' or 'Relocation', for example.

To use the **Pastoral Management** module effectively, your System Administrator must configure and manage the record reasons to best suit your school's needs.

For more details, see:

- » "Setting up Record Reasons" below.
- » "Editing Record Reasons" on the next page.
- » "Deleting Record Reasons" on page 61.



**Note:** Normally, these settings 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**.

- 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 type="radio"/>	<input checked="" type="checkbox"/>	Parents/Guardians Divorcing
<input type="radio"/>	<input checked="" type="checkbox"/>	Bereavement
<input type="radio"/>	<input checked="" type="checkbox"/>	Bullying
<input type="radio"/>	<input checked="" type="checkbox"/>	Antisocial Behaviour
<input type="radio"/>	<input checked="" type="checkbox"/>	Relocation
<input type="radio"/>	<input checked="" type="checkbox"/>	Illness (Long Term)
<input type="radio"/>	<input checked="" type="checkbox"/>	Illness (Short Term)
<input type="radio"/>	<input checked="" type="checkbox"/>	Concerning Behaviour
<input type="radio"/>	<input checked="" type="checkbox"/>	

**Note:** The colour of the dot in the first column denotes the status of the row. For more information, see the *Getting Started User Guide*, available from the *3sysACADEMIC Online Help*, or **About Grids** in the *3sysACADEMIC Online Help*.

- 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.
- Click **Save**.

## Editing Record Reasons

### HOW TO EDIT A RECORD REASON

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

More details...

- 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

- (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*, available from the *3sysACADEMIC Online Help*, or **About Grids** in the *3sysACADEMIC Online Help*.

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, repeat steps 2 to 5.

## 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*, available from the *3sysACADEMIC Online Help*, or **About Grids** in the *3sysACADEMIC Online Help*.

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

## Configuring Categories

Pastoral records are assigned categories. Categories help organisations to manage staff access to 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.

Shapes and colours can be assigned to pastoral management categories, creating icons that can appear in grids such as the **Pupil Search** grid (if set when a record is created). This provides a visual alert. For example, a pink star could be assigned to a critical category, a yellow square to a medium priority category and a blue circle to a low priority category. In this way, users can identify pupils with open records at a glance and, if they are aware of what the icons represent, the type of record / issue.

Pupil Search							
View: <span>Standard</span> <span>Add Copy</span>							
▸ Refine Search							
<span>Add</span> <span>Add Event</span> <span>Create Pupil Custom Group</span> <span>Email</span> <span>Add Pupil Document</span>							
Pupils <span>Pupil Events</span> <span>More Actions</span>							
Actions	<input type="checkbox"/>	Code ^	Name		Preferred name	Form	Leaving date
View Edit	<input type="checkbox"/>	ADA001	ADAMS, Lauren S	●	Lauren	Form 11A	
View Edit	<input type="checkbox"/>	ADA003	ADAMS, Sarah J	●	Sarah	Form 7A	
View Edit	<input type="checkbox"/>	ALL001	ALLAN, Samantha E		Sam	Upper Sixth	
View Edit	<input type="checkbox"/>	ALL002	ALLAN, Tom	■	Tom	Upper Sixth	
View Edit	<input type="checkbox"/>	ALL100	ALLEN, David		David	Form 4B	
View Edit	<input type="checkbox"/>	ALT010	ALTON, Benjamin	★	Ben	Form 1A	
View Edit	<input type="checkbox"/>	ASH001	ASHMAN, Timothy George		Timothy	Form 11A	
View Edit	<input type="checkbox"/>	ASH003	ASHFIELD, Gemma Frances		Gemma	Form 9A	
View Edit	<input type="checkbox"/>	ASL001	ASLETT, Fletcher	■	Fletcher	Form 9A	
View Edit	<input type="checkbox"/>	BAI001	BATES, Karen Jane		Karen	Upper Sixth	

**Note:** Whether icons appear in **Pupil Search** and other grids must be set in the individual pastoral records using the **Show Alert Against Pupil** check box when a relevant record category is selected. For more information, see ["About Adding Pastoral Records"](#) on page 24.

To use the **Pastoral Management** module effectively, your System Administrator must configure and manage the categories to best suit your school's needs.

For more details, see:

- » ["Setting up Categories"](#) on the next page.
- » ["Viewing Categories"](#) on page 66.
- » ["Editing Categories"](#) on page 68.
- » ["Deleting Categories"](#) on page 70.

**Note:** Normally, these settings are configured by your System Administrator. As such, you may not be able to see this section when you log in.

## Setting up Categories

### HOW TO SET UP A CATEGORY

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

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

Pastoral Management  
Setup: Category Search

Category:

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

Page Size:      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.

2. Click **Add**.

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

Pastoral Management  
Setup: Add a Category

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.

Category:

Shape:

Colour:

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:




**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.

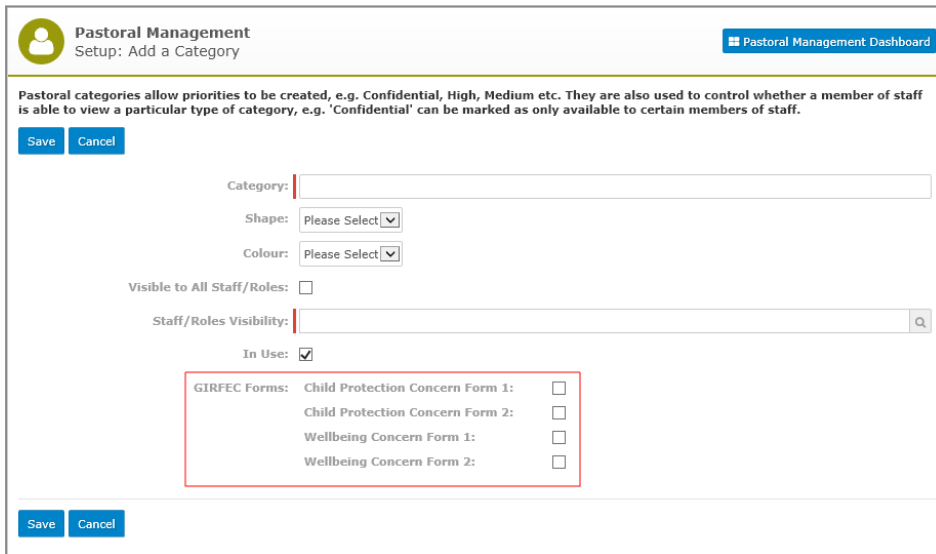
3. Click in the **Category** field and add the name of the new pastoral management category.
4. Use the **Shape** and **Colour** drop lists to select the shape and colour of the icon associated with this category.
5. To set the category's visibility, do ONE of the following:
  - » If the category should 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, accessed via .

**More details:** If you are unsure how to add one or more staff member's name(s) to this field, see "[Retrieving Multiple Staff Members' Names](#)" on page 20.

6. Check that the **In Use** check box is ticked to ensure that the category is live and available when pastoral management issues are recorded.
7. (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:

Shape:

Colour:

Visible to All Staff/Roles:

Staff/Roles Visibility:

In Use:

GIRFEC Forms:

Child Protection Concern Form 1:

Child Protection Concern Form 2:

Wellbeing Concern Form 1:

Wellbeing Concern Form 2:

Save Cancel

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

8. 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.

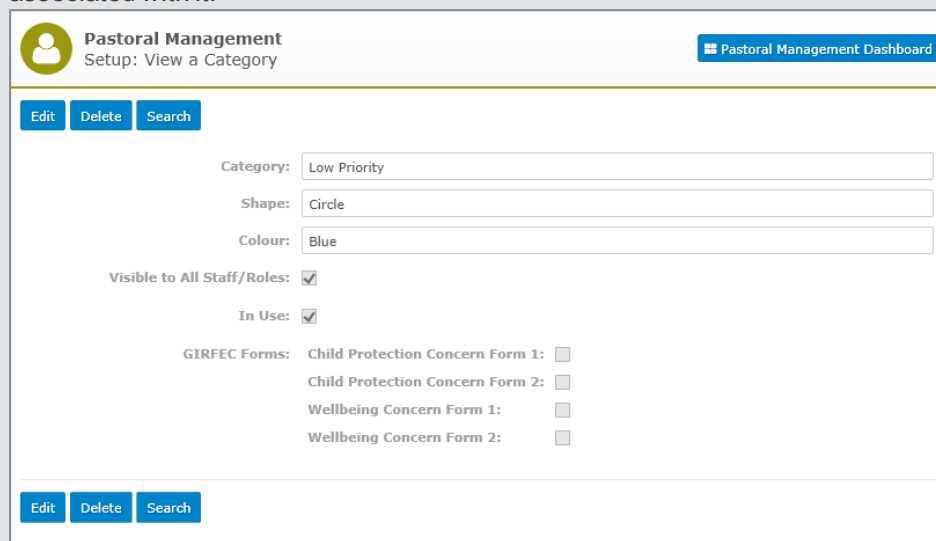
- >> Click or or on the numbers underneath the grid on the left-hand side to move between pages.
- >> Click to go to the first page or to go to the last page.
- >> Use the **Page Size** options to see more records on each page.

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:** 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. It is represented by a blue circle and no GIRFEC forms are associated with it.



**Pastoral Management**  
Setup: View a Category [Pastoral Management Dashboard](#)

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

Category:

Shape:

Colour:

Visible to All Staff/Roles:

In Use:

GIRFEC Forms: Child Protection Concern Form 1:   
Child Protection Concern Form 2:   
Wellbeing Concern Form 1:   
Wellbeing Concern Form 2:

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



**Note:** GIRFEC options are for Scottish schools and only appear if configured on your system. For more information, see "[Configuring GIRFEC](#)" on page 72.

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.

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

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. The icon representing it is a red star.

**Pastoral Management**  
Setup: Edit 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:

Shape:  ▼

Colour:  ▼

Visible to All Staff/Roles:

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 are for Scottish schools and only appear if configured on your system. For more information, see ["Configuring GIRFEC" on page 72](#).

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.
  - >> 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' setup screen for deleting a category. The page title is 'Pastoral Management' with a sub-header 'Setup: Delete a Category'. A 'Pastoral Management Dashboard' button is in the top right. At the top left, there are 'Delete' and 'Cancel' buttons. The form contains the following fields and options:

- Category: Normal Priority
- Shape: Circle
- Colour: Green
- Visible to All Staff/Roles:
- In Use:
- GIRFEC Forms:
  - Child Protection Concern Form 1:
  - Child Protection Concern Form 2:
  - Wellbeing Concern Form 1:
  - Wellbeing Concern Form 2:

At the bottom left, there are 'Delete' and 'Cancel' buttons.

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

The screenshot shows the 'Pastoral Management' setup screen for deleting a category. The page title is 'Pastoral Management' with a sub-header 'Setup: Delete a Category'. A 'Pastoral Management Dashboard' button is in the top right. At the top left, there are 'Delete' and 'Cancel' buttons. The form contains the following fields and options:

- Category: High Priority
- Visible to All Staff/Roles:
- In Use:
- GIRFEC Forms:
  - Child Protection Concern Form 1:
  - Child Protection Concern Form 2:
  - Wellbeing Concern Form 1:
  - Wellbeing Concern Form 2:

A red error message is displayed above the 'Category' field: "Unable to delete Category as it is linked to a Pastoral Management Record." At the bottom left, there are 'Delete' and 'Cancel' buttons.

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.

## 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 **Page** 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'.

 **Note:** To skip through the available options, click on the **Modules** drop list and press the first letter of the module you want, e.g. 'P' for 'Pastoral / Behaviour'. Press the letter repeatedly until you reach the required module.

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

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

 **Note:** Selecting a module using the **Modules** drop list causes the screen to refresh to show only permission settings relating to that module.

- 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, Wirral Park Road, Glastonbury, Somerset, BA6 9FR, UK

