

Agents & Contacts in STAR 7

Managing Contacts

People are considered to be **Contacts** once they have been associated with individuals in the system, such as pupils/students or members of staff. Contacts are generally parents or legal guardians of children and spouses/partners of staff members. This Quick Reference Sheet describes how to manage pupil/student contacts.

It is a statutory requirement that schools store pupil's/student's contact information in case of emergencies. The contact information can either be added whilst adding pupil/student information or through the **Contacts** menu route. The following information details how to use the **Contacts** page:

1. Select **Focus | Person | Contacts** to display the **Find Contacts** browser.
2. Search for the contact to ensure that they do not already exist.
3. If they do not, click the **New** button and enter the **Basic Details**.
4. Click on the **Continue** button to display the entire **Contact Details** page and enter the remainder of their basic details.
5. Enter the **Address** details. There are several ways of completing the address details. Please press **F1** or click on the **Help** button for detailed instructions.
6. Enter the **Contact Information**, e.g. telephone number, fax number, etc.
The new contact must now be associated with the relevant pupils/students in the system.
7. Click on the **New** button in the **Associated Students** panel to open the **Select Student** dialog.
8. Search for the relevant pupil/student(s) and specify their relationship with the new contact, e.g. parent.
9. If the contact will be receiving **Correspondence** relating to the pupil/student, select the check box. If the contact has **Parental Responsibility** for the child and receives the school **Pupil Report**, select the respective check boxes.
10. If there is a **Court Order** in place restricting this contact's access to the child, select the check box.
11. Enter the **Priority** for this contact. Parents and legal guardians will normally be allocated the highest priority. The higher the number, the higher their priority.
12. Click the **OK** button to save the details.
13. Repeat for any other associated student(s).
14. Specify the new contact's **Language** and **Job Details** and click the **Save** button to save the details entered.

The screenshot shows the 'Find Contacts' window with search fields for Surname, Forenames, and Postcode. Below is a table of contacts:

Name	Title	Home Address	Telephone	Court Order(s)
ABLE, E	Mrs	45 Willow Street W/verton Rappshire SI111PR		
ABLE, Gary	Mr	45 Willow Street W/verton Rappshire SI111PR		
ABLETT, Mr	Mr	31 Castle Foregate EAST TOWN Eastshire SI1 1AA	847998	

The 'Contact Details' window shows fields for Title (Mrs), Forename (E), Surname (ABLE), Date of Birth, Gender (Female), Parental Ballot (checked), and Address details for Current Home and Current Work addresses.

Copying and Cloning Contacts

In the **Contacts** panel there are five buttons allowing different actions that can only be undertaken through the **Student Details** page.

1. Select **Focus | Student | Student Details** to display the **Student Details** browser.
2. Search for the pupil/student to whom you wish to add Contact information.
3. Whilst adding or editing a pupil/student's basic details, click on the **Family/Home** hyperlink to display the **Family/Home** panel.

The 'Family/Home' panel shows a table of contacts with columns for Priority, Name, Relationship, Court Order, and Telephone. Action buttons include New, Open, Delete, Copy, and Clone.

Priority	Name	Relationship	Court Order	Telephone
1	ABLE, Mrs E	Step Parent		425738
1	ABLE, Mr Gary	Father		01783 4251...

Copying Contacts

Copying enables you to associate an existing pupil's/student's contact with a completely different pupil/student. For example, a younger sibling may join the school and their contact details will be identical to their older brother who already attends your school. Instead of entering the same contact details again, you can copy the existing contact details.

1. Click on the **Copy** button adjacent to the **Contacts** panel to open the **Copy Contacts** dialog.
2. Search for the pupil/student whose contacts you wish to copy and double click on the required pupil/student's name to view their existing **Contacts**.
3. Select the required contacts individually by selecting the check boxes next to their names. Alternatively, select or deselect contacts using the **Check All** and **Uncheck All** buttons.

4. When you have made your selection, click the **OK** button to populate the new pupil/student's **Contacts** panel in their **Student Details** page with the copied contacts.

Cloning Contacts

Cloning enables you to re-use some of the basic details of an existing contact and modify their details to create a new contact. For example, adding a child's father as a contact may enable you to use the mother's existing address details and simply change the name, etc., providing that they share the same address.

1. Highlight an existing contact and click on the **Clone** button to open the **Add/Edit Contact Details** dialog.

All individuals already entered into the system who are a close match to the existing contact you selected, will be displayed in the **Matched People** panel. Use the instructions displayed to proceed with adding or editing a contact.

If the exact contact you want to clone is displayed in the **Matched People** panel and requires no amendments, highlight their name and click the **Select** button. The **Add Contact Information** dialog will be displayed with the name of the selected **Contact** already populated.

2. Search for the relevant pupil/student(s) and specify their relationship with the new contact, e.g. parent.
3. Continue from step 9 - 11 as detailed in **Managing Contacts** above.
4. Click the **OK** button to save the details.

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Definition of Agents & Agencies

An Agent:

An individual who has some involvement in a child's development or education. They could be doctors, Educational Psychologists from the LEA Support Team or other external specialists who are being consulted about particular children.

An Agency:

An organisation that employs the Agents entered into the system. The Agency could be an LEA Support Team or a Doctor's Surgery or any other organisation that employs people who are classed as Agents in the system.

Adding Agencies and Associating Existing Agents

It is advisable to add all known Agencies to the system before entering the details of the Agents who work for them. For example, the details of a new doctor's practice, Fairview Surgery, should be entered before the individual doctors are associated with their employer.

Adding a New Agency

1. Select **Focus | Agency | Agencies** to display the **Agency** browser.
2. Search for the new Agency to ensure it does not already exist (for more information on searching, please refer to the Getting Started with SIMS .net Quick Reference Sheet).
3. If it does not, click on the **New** button and enter the **Agency Name**.
4. Complete the fields in the **Enter New Address** panel and click the **Continue** button to display the **Address Details** panel.
5. Enter the known **Address Details** for the new Agency. There are several ways of completing the address details. Please press **F1** or click on the **Help** button for detailed instructions.
6. Complete the **Contact Details** panel.

*NOTE: If you prefer, you can save the Agency Details now by clicking on the **Save** button. The relevant Agents can be associated at a later date.*

Associating Existing Agents with the New Agency

1. Click on the **New** button in the **Agents** panel to open the **Add Agent** dialog.
2. Click on the **Browser** button to display the **Select Agent** browser.
3. Search for the **Agents** who should be associated with the new Agency by entering their **Surname, Forename, Postcode** or by selecting the **Agent Type** from the drop-down list. Highlight the required **Agent** from the list and click the **OK** button to populate the **Agent Name** field. Select their **Job Title** from the drop-down list and click the **OK** button to associate them with the new Agency.
4. Continue adding **Agents** to the **Agency** in this way until you have associated all the relevant individuals who work for the new Agency.

Adding New Agents

New Agents must be attached to an Agency within the system to indicate who they are employed by.

1. Select either **Focus | Person | Agents** to display the **Find Agent** browser.
2. Search for the new Agent to ensure they do not already exist.
3. If they do not, click on the **New** button and enter their **Basic Details** before clicking the **Continue** button.
4. Select their **Title** from the drop-down list and enter their **Middle Name(s)**, if known.
5. Enter their **Address Details**. There are several ways of completing the address details. Please press **F1** or click on the **Help** button for detailed instructions.
6. Enter the **Contact Information**, e.g. telephone number, fax number, etc.

NOTE: The new Agent must be associated with at least one Agency before their details can be saved.

7. If required, they can now be linked to existing **SEN Pupils** and their **Relationship Type** specified. For example, they may be a speech therapist for a number of pupils/students with learning difficulties.

Once saved, the Agent will be shown as a **Linked Adult** in the SEN Pupil's Details record. Please refer to the *Special Educational Needs in SIMS .net handbook (SEN.PDF)* for further information.

8. Any **Documents** or **Notes** relating to the Agent can also be added, if required.

Where to Get More Help

Need additional help? On-line help is available by selecting **Help | Contents** from the SIMS .net Menu Bar. Associated handbooks are available from SupportNet, <http://support.capitaes.co.uk>. Additional information and other supporting documentation can be found in **SIMS Help**, available from the Shortcuts Bar in SIMS .net.

This guide is based on the version of the software (7.30) in use at the time of publication. For details of changes to the software, please refer to the associated handbook and on-line help file.

For further copies of this, or other laminates, please email publications@capita.co.uk.

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