How to Add Agents (e.g. Education Welfare Officers)

Applicable to SIMS .net version

7.108 onwards.

Permissions required

You will need to be a member of any of the following user groups in System Manager to add agents:

Administration Assistant, Class Teacher, Pastoral Manager, School Administrator, SEN Coordinator, Senior Management Team.

Please see your System Administrator/Manager if you are not sure whether you have the required permissions.

Introduction

In SIMS .net, an '*agent*' is an individual who has some involvement with a pupil/student, such as Education Welfare Officers (EWOs), taxi drivers, educational psychologists, speech therapists, etc. Agents work for '*agencies*' who are organisations that employ agents recorded in SIMS .net, such as the Education Welfare Service, a Local Authority Support Team, a Behavioural Support Service, a Taxi Firm, etc.

It is advisable to add all agencies to the system before adding individual agents. For more information, please see the *How to Add an Agency (e.g. the Education Welfare Service)* help sheet (SupportNet Resource Number *10875*).
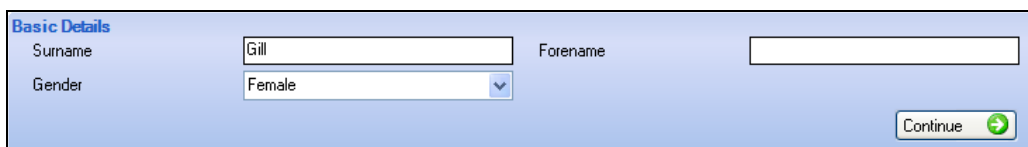
This help sheet describes how to add an Education Welfare Officer (agent) and then attach them to the Education Welfare Service (agency).

Adding agents

1. Select **Focus** | **Person** | **Agents** to display the **Find Agent** browser.

2. Carry out a search to ensure the agent does not already exist.

3. Click the **New** button to display the **Basic Details** panel.
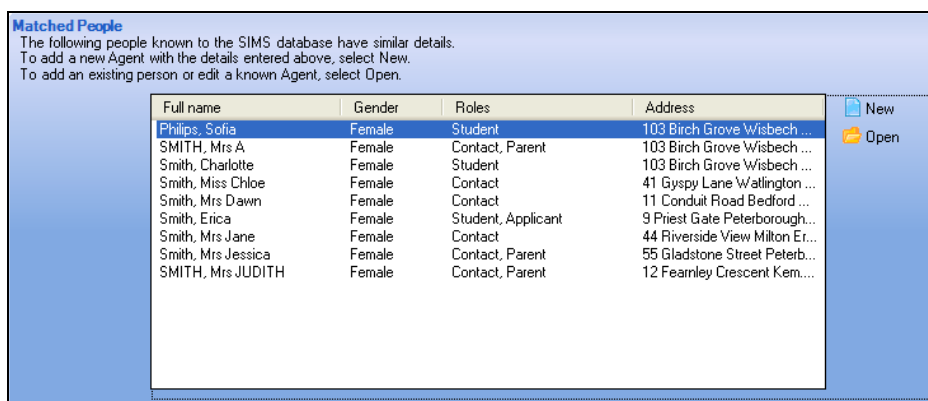
Completing basic details

1. Enter any combination of the **Surname** (mandatory), **Forename** and/or select the **Gender** from the drop-down list and then click the **Continue** button. This provides the opportunity of checking that the agents does not already exist (they could for example work for the school or be the contact of a child and therefore have already been added to SIMS .net).

   ▪ If no existing people match, the **Agent Details** page will be opened and populated with the details entered in step 1.

   ▪ Any people matching the entered details will be displayed in the **Matched People** panel.

   If the required person is not listed, click the **New** button. The **Agent Details** page will be opened and populated with the details entered in step 1.

   If the required person is listed, highlight their name and click the **Open** button. Any existing details (excluding any addresses) will be displayed in the **Agent Details** page.

2. The **Agent Details** page is displayed, either populated with existing data (if the agent already existed in SIMS .net) or with the data entered in step 1. Complete any missing information in the **Basic Details** panel.

Attaching a photograph

1. If you have an electronic copy of a agent photo, this can be attached to the record by clicking the **File Browser** button to open the **Select photograph** dialog.

     File Browser button
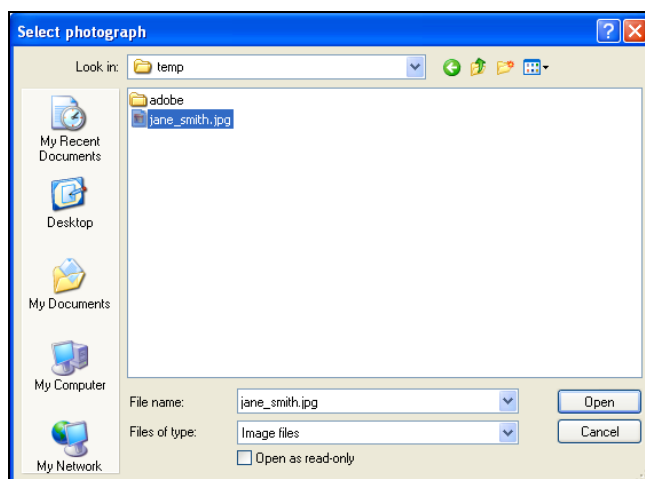
2. Select the required file and then click the **Open** button. The selected photo will appear in the **Basic Details** panel.

Adding an address

When adding addresses, the most efficient method is to search for any existing addresses which can either be opened or copied. In addition to searching your SIMS .net database, if you have activated the Web Address Validation Service, it is also possible to search an external database via the internet by entering a post code and matching it to a corresponding address. This significantly reduces the amount of address data entry required.
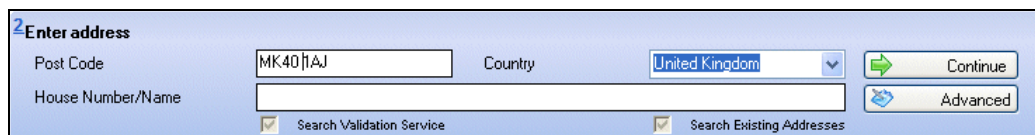
There are two modes for entering an address – **Basic** or **Advanced**.

Basic - a post code must be provided together with a house number or name if available. A search is carried out on both the SIMS .net database and the Web Address Validation Service. This is by far, the most efficient method.
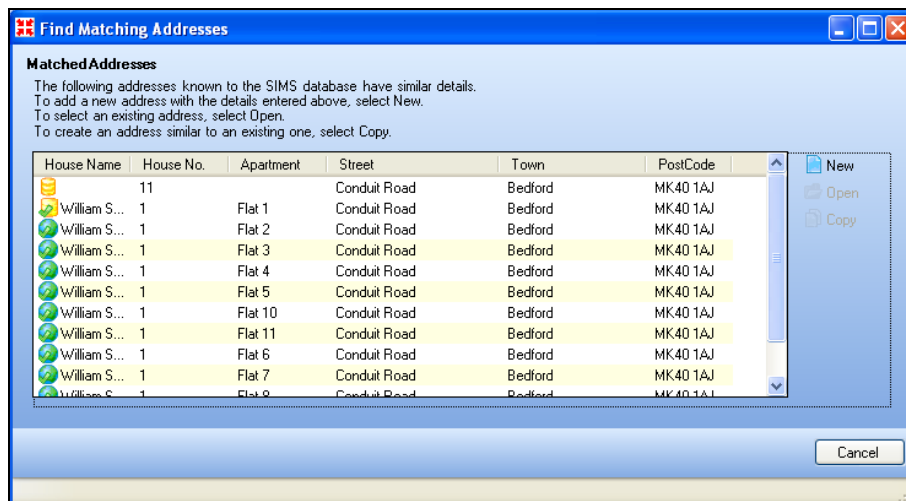
Advanced - a post code, street or town/city must be supplied. The search is only carried out on existing addresses in the SIMS .net database. If the Address Validation Service has not been activated, this will be the method used.

Adding an address using Basic mode

1. Enter the **Post Code** and if available, the **House Number/Name**.
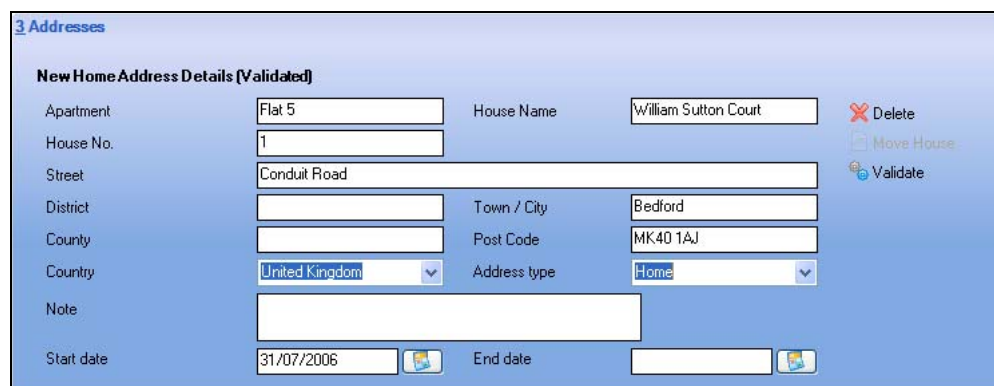

2. Click the **Continue** button. A list of addresses matching the entered post code is returned in the **Find Matching Addresses** dialog.

If an exact match is found, highlight the required address then click the **Open** button to select it. The following icons help to identify the type of address:

   Identifies an address currently on the web service

   Identifies a local address that has not yet been validated.

   Identifies a local address that has been validated.

The address is displayed in the **Addresses** panel and is highlighted as **Validated**.

*NOTES: When recording some address (such as pupil/student), it is possible to select an **Address type** which defaults to the type applicable to address being added. For example, if the address is for a contact, the type will default to **Home**. If this is an address for an agency, the type will default to **Work**.*

*It is also possible to add **Notes** and/or **Start** and **End** dates to some addresses.*

- If a similar address is identified in the **Find Matching Addresses** dialog, highlight it then click the **Copy** button to create a copy which can be amended as required.
- If the required address does not exist, click the **New** button in the **Find Matching Addresses** dialog. The **New Address Details (Not validated)** panel is displayed and is populated with the address details first entered in the search.

3. Complete any remaining fields as required, ensuring that the type of address, e.g. **Home** is selected from the **Address type** drop-down list.

Adding an address using Advanced mode

1. If the post code is not known, click the **Advanced** button to display additional address fields. A minimum of either **Street** or **Town/City** must be supplied.

2. Click the **Continue** button to search existing addresses in your SIMS .net database. A list of matching addresses is returned in the **Find Matching Addresses** dialog.

- If an exact match is found, select the required address then click the **Open** button to select it.

The address is displayed in the **Addresses** panel and is highlighted as **Not validated**.

*NOTES: When recording some address (such as pupil/student), it is possible to select an **Address type** which defaults to the type applicable to address being added. For example, if the address is for a contact, the type will default to **Home**. If this is an address for an agency, the type will default to **Work**.*

*It is also possible to add **Notes** and/or **Start** and **End** dates to some addresses.*

- If a similar address is identified in the **Find Matching Addresses** dialog, highlight it then click the **Copy** button to create a copy which can be amended as required.
- If the required address does not exist, click the **New** button in the **Find Matching Addresses** dialog. The **New Address Details (Not validated)** panel is displayed and is populated with the address details first entered in the search.

4. Complete any remaining fields as required, ensuring that the type of address, e.g. **Home** is selected from the **Address type** drop-down list.

Adding telephone numbers and email addresses

1. Click the **Telephones and Email Addresses** hyperlink to display the **Telephones and Email Addresses** panel.

Adding a telephone/fax number:

1. Click the **New** button to open the **Add Telephone\Fax** dialog.

2. Specify the type of **Device** (**Telephone** or **Fax**), together with its **Location** (**Home**, **Work**, **Mobile** or **Other**) from the relevant drop-down lists.

3. Enter the telephone or fax **Number**.

NOTE: The format of the telephone/fax number is optional. STD codes can be inserted in brackets if required and spaces can be added between the STD code and number if preferred. It is recommended that either brackets or spaces are used to aid clarity.

4. Indicate whether this is the **Main** phone number by selecting either **Yes** or **No** from the drop-down list. Only one number can be set as **Main** at any one time. It is recommended that the main number is the number to be used in the event of an emergency.

5. Enter any relevant **Notes** that may apply to the use of this telephone/fax number, e.g. **use between 9am to 5pm**.

6. Click the **OK** button to add the number. Repeat as required. Any numbers added will be displayed in the **Telephones** panel.

	Device	Location	Number	Main	Notes	
Telephones\Fax Numbers:	Telephone	Work	01234 123456	Yes	Use between 9am and 5pm	New / Open / Delete

7. If required, change the main number by highlighting the required number and clicking the **Set Main** button.

Adding an email address

1. Click the **New** button to open the **Add Email** dialog.

2. Specify the **Location** of the email address (**Home**, **Work** or **Other**) from the drop-down list.

3. Enter the email **Address** in the field provided. The field will remain red until both an **@** symbol and a full stop have been included in the email address.

4. Specify whether this is the **Main** email address by selecting either **Yes** or **No** from the drop-down list.

5. Enter any relevant **Notes** that may apply to the use of this email address, e.g. **only checked every 2-3 days**.

6. Click the **OK** button to add the email address. Repeat as required. Any email addresses added will be displayed in the **Email Addresses** panel.

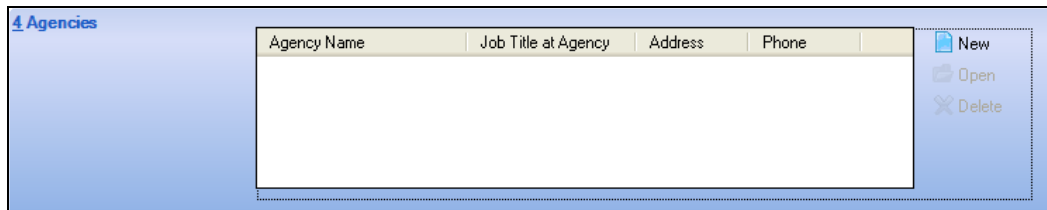|	Address	Location	Main	Notes	
Email Addresses:	jane.smith@btinternet.com	Home	Yes	Only checked every 2-3 days.	New / Open / Delete / Send

7. Change the main email address if required, by clicking the **Set Main** button.

Assigning the agent to an agency

Once an agent has been added, they must then be assigned to the appropriate agency before the record can be saved.
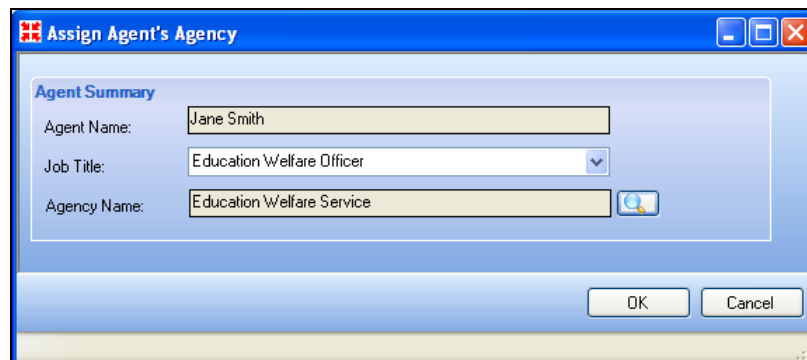
1. Click the **Agencies** hyperlink to display the **Agencies** panel.

2. Click the **New** button to open the **Assign Agent's Agency** dialog.
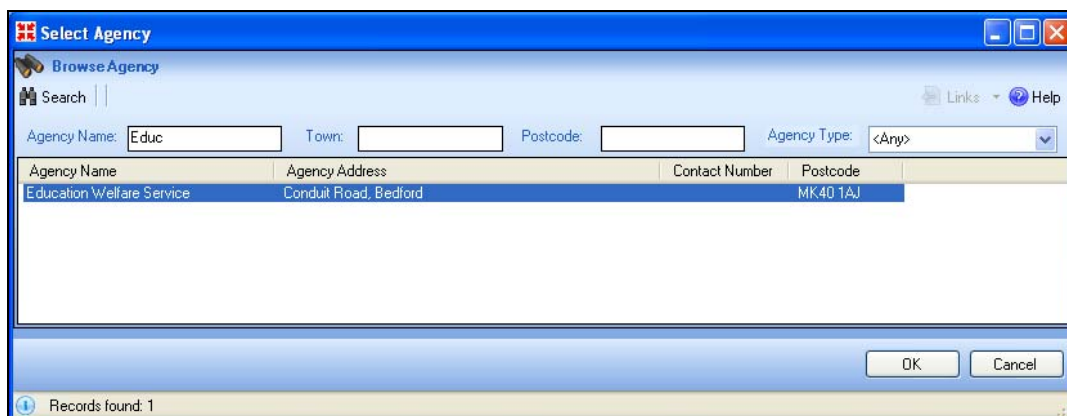
3. Select the agent's **Job Title** from the drop-down list, e.g. **Doctor**, **External Specialist**, **Speech Therapist**, etc.

4. Click the **Browser** button to open the **Agency** browser.

 Browser button
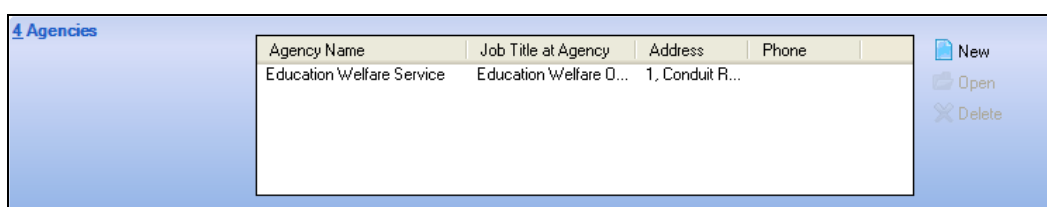
5. Search for the required agency by entering the **Agency Name** and clicking the **Search** button.

6. Highlight the required agency and then click the **OK** button to assign the agent to the selected agency which will be displayed in the **Agencies** panel.
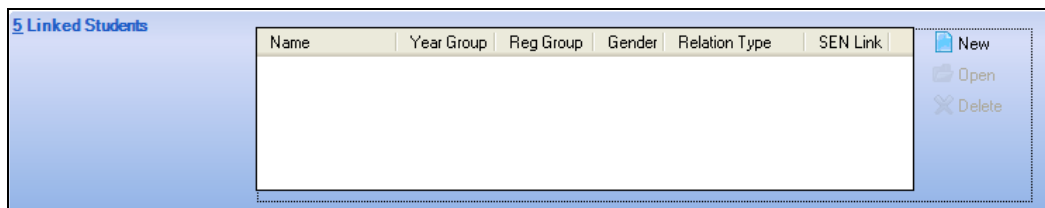
## Adding any linked pupil/students to the agent

It is possible to associate an agent with one or more pupil/students that they work with. For example, a speech therapist may work with several pupil/students at your school. Linking them to the appropriate agent prevents the need for manually assigning the agent to individual pupil/student records.

1. Click the **New** button in the **Linked Students** panel to open the **Add Linked Students** dialog.
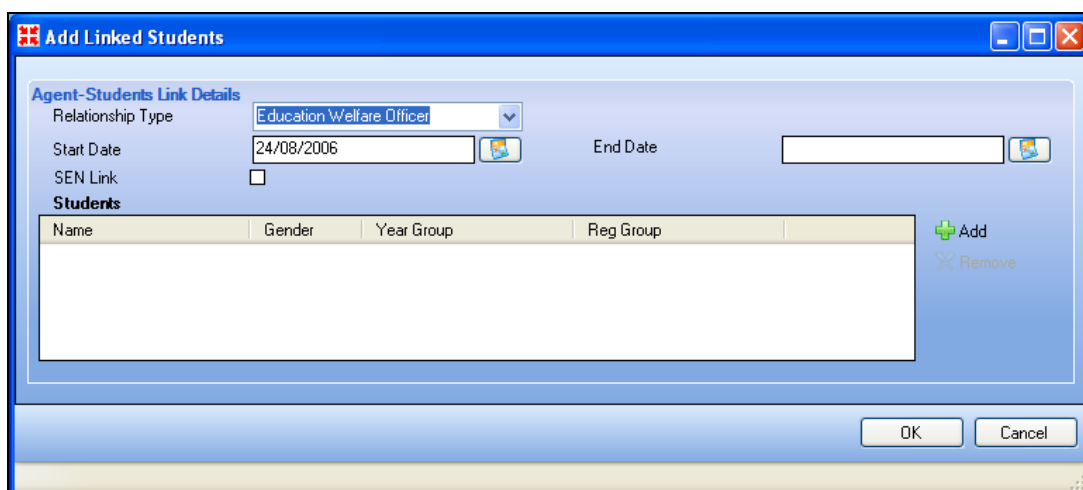
2. Select the type of link between the agent and the pupil/students from the **Relationship Type** drop-down list, e.g. **Speech Therapist**.

3. The **Start Date** defaults to today's date, but can be amended as required. Specify an **End Date** if the pupil/students are to be linked for a limited period only.

4. Select the **SEN ink** check box if the pupil/students are to linked on the basis of an SEN need (this will add them as a Linked Adult in the SEN area of SIMS .net).

5. Click the **Add** button in the **Students** panel to open the **Select Students** browser.
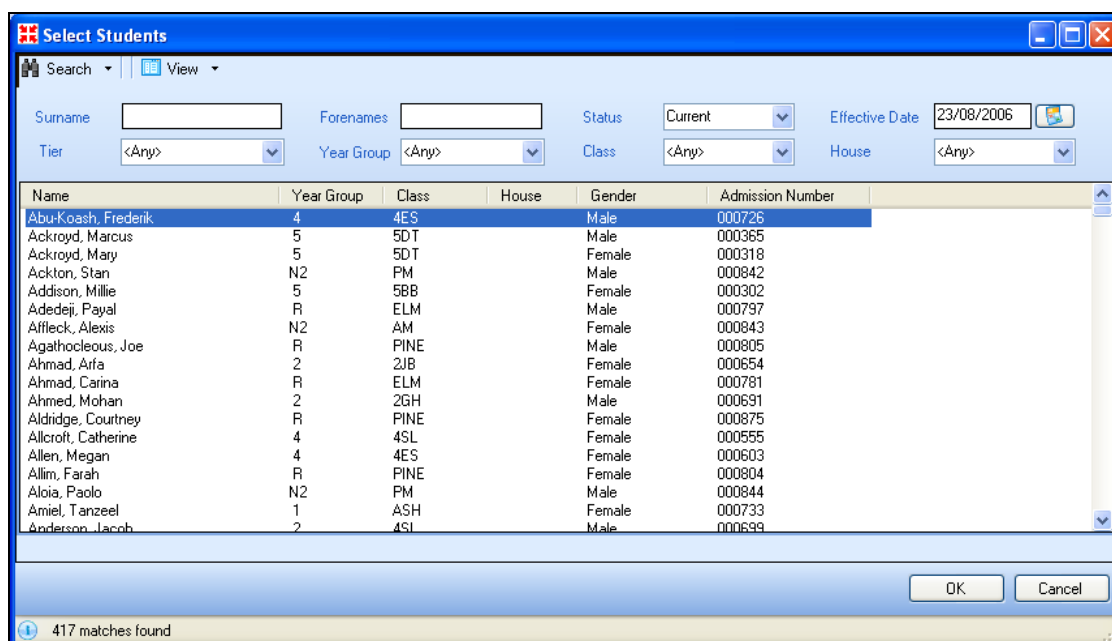
6. If searching for an individual pupil/student, enter the **Surname** and/or **Forename**. Alternatively, restrict the search results using the appropriate drop-down lists, such as selecting a specific **Year Group**. Click the **Search** button to carry out the search.

7. Highlight the pupil/students to be linked using any of the following methods:
    - Hold down the **Ctrl** key and click each required pupil/student to highlight them.
    - To highlight sequentially listed pupil/students, click the first required pupil/student, hold down the **Shift** key, then single-click the last required pupil/student (alternatively, hold down the **Shift** key and press the **Down Arrow** key).

8. By default, the results are returned including all the pupil/student details (such as Year Group, Class, Hose, etc.). If you intend to select a large number of pupil/student, it may be preferable to change the view to a simple list. This is achieved by click the **View** button down-arrow and selecting **Lists** from the drop-down menu.

9. Once the required pupil/students have been selected, click the **OK** button to return to the **Add Linked Students** dialog. The chosen pupil/students will be listed in the **Students** panel.

10. Click the **OK** button to link the chosen pupils/students to the agent.

The pupil/students will then be displayed in the **Linked Students** panel.

Adding notes/attaching documents

Notes can be added or documents (or any file) attached to the record. For more information, please see the *How to Add Notes/Attach Documents* help sheet (SupportNet Resource Number *9076*). Examples include the following:

- Leaflets of available services
- Letters sent/received
- Price lists/charges

Saving details

Click the **Save** button on the toolbar to save agent.

For more information, please refer to:

- *Managing Pupil/Students in SIMS .net* handbook.
- *How to Add an Agency (e.g. the Education Welfare Service)* help sheet (SupportNet Resource Number *10875*).

All handbooks can be accessed from the **Documentation Centre** which is launched by clicking the **Documentation** button on the **Home Page** in SIMS .net. Once open, click the **Handbooks** button and select the required handbook from the **Handbooks** page.

A sample selection of help sheets are available from the **Documentation Cente** in SIMS .net which can be accessed by clicking the **Documentation** button on the toolbar, then clicking the **Help Sheets** button. All available help sheets can be obtained from our SupportNet home page (http://support.capitaes.co.uk) by clicking the **Documentation** button, then selecting **Help Sheets** from the **Categories** drop-down list.

Training courses

For information on training courses, please contact your SIMS Support Provider.

Providing feedback on this help sheet

If you have any suggestions or comments about this or any of our other help sheets, please email helpsheets@capita.co.uk.

Help sheet revision history

Doc. Version	Change Description	Date
1031-001	Initial Release	08/09/05
1031-002	Updated to include Web Address Validation available from SIMS .net 7.68 onwards.	07/02/06
1031-003	Updated for SIMS .net 7.74 to include the facility to attach multiple linked pupil/students to an agent.	19/05/06
1031-004	Updated to include some minor corrections and change of agent to Education Welfare Officer (to match the corresponding agency help sheet)	13/06/06
1031-005	Updated to reflect SIMS .net new look released with 7.78 plus some general improvements to text.	24/08/06
1031-006	Updated cross references with new documentation location.	05/11/08