



# 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).

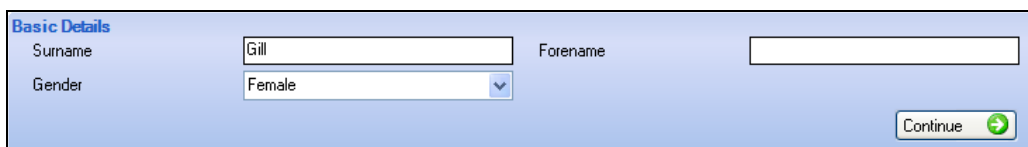
This help sheet describes how to add an Education Welfare Officer (agent) and then attach them to the Education Welfare Service (agency).

## 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



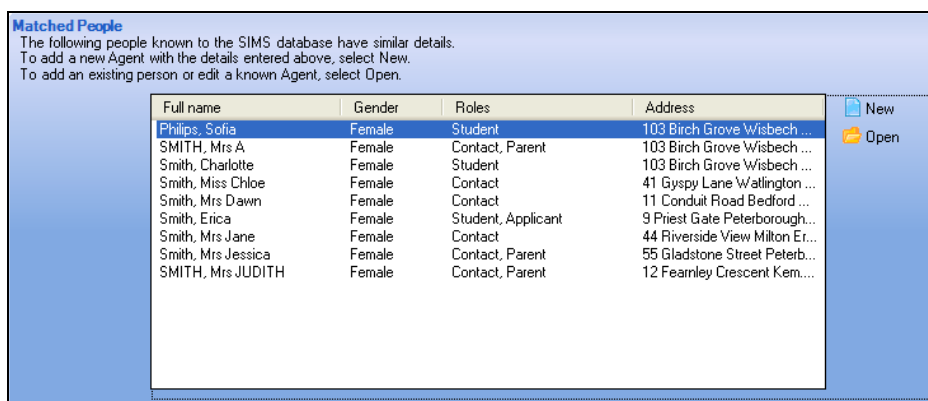
**Basic Details**

Surname:  Forename:

Gender:  



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.



**Matched People**

The following people known to the SIMS database have similar details.  
To add a new Agent with the details entered above, select New.  
To add an existing person or edit a known Agent, select Open.

Full name	Gender	Roles	Address
Philips, Sofia	Female	Student	103 Birch Grove Wisbech ...
SMITH, Mrs A	Female	Contact, Parent	103 Birch Grove Wisbech ...
Smith, Charlotte	Female	Student	103 Birch Grove Wisbech ...
Smith, Miss Chloe	Female	Contact	41 Gypsy Lane Watlington ...
Smith, Mrs Dawn	Female	Contact	11 Conduit Road Bedford ...
Smith, Erica	Female	Student, Applicant	9 Priest Gate Peterborough...
Smith, Mrs Jane	Female	Contact	44 Riverside View Milton Er...
Smith, Mrs Jessica	Female	Contact, Parent	55 Gladstone Street Peterb...
SMITH, Mrs JUDITH	Female	Contact, Parent	12 Fearnley Crescent Kem...

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.


**Agent Details: Smith**

Save | Undo | Print

1 Basic Details 2 Addresses 3 Telephones and Email Addresses 4 Agencies 5 Linked Students 6 Notes and Documents

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**1 Basic Details**

Surname:  Photograph: 

Forename:

Middle Name(s):

Title:

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**2 Addresses**

**Enter address**

Post Code:  Country:

House Number/Name:

☒ Search Validation Service ☒ Search Existing Addresses

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**3 Telephones and Email Addresses**

**Telephones**

Device	Location	Number	Main	Notes

**Email Addresses**

Location	Main	Email Address	Notes

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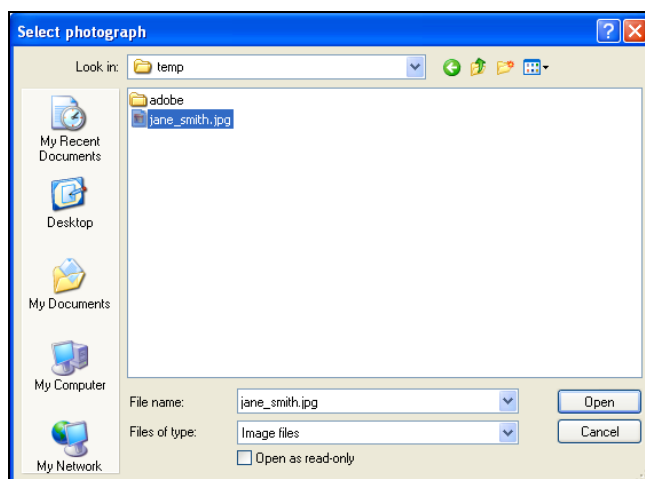
**4 Agencies**

Agency Name	Job Title at Agency	Address	Phone

### 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.

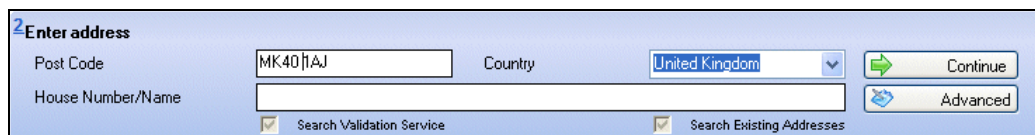
There are two modes for entering an address – **Basic** or **Advanced**.

**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.

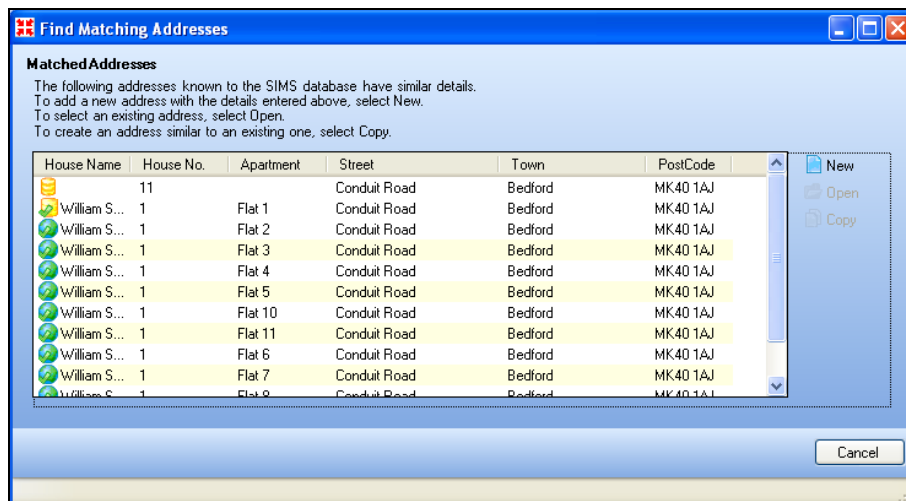
**Advanced** - a post code, street or town/city must be supplied. The search is only carried out on existing addresses in the SIMS .net database. If the Address Validation Service has not been activated, this will be the method used.

### ***Adding an address using Basic mode***

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






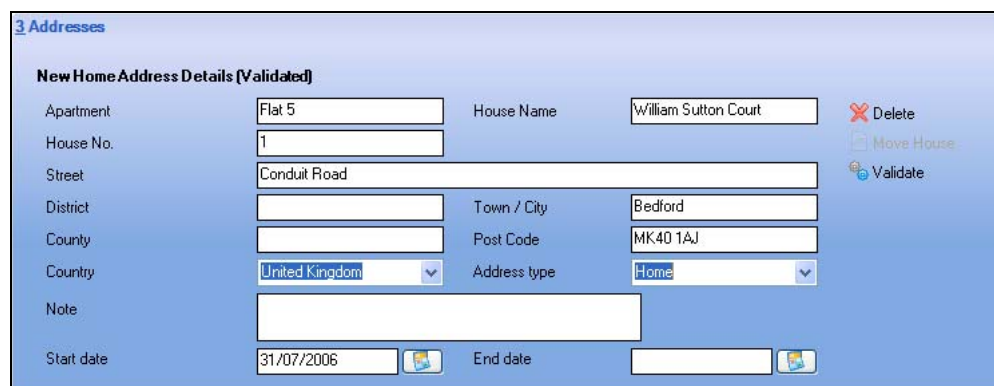
2. Click the **Continue** button. A list of addresses matching the entered post code is returned in the **Find Matching Addresses** dialog.



House Name	House No.	Apartment	Street	Town	PostCode
	11		Conduit Road	Bedford	MK40 1AJ
William S...	1	Flat 1	Conduit Road	Bedford	MK40 1AJ
William S...	1	Flat 2	Conduit Road	Bedford	MK40 1AJ
William S...	1	Flat 3	Conduit Road	Bedford	MK40 1AJ
William S...	1	Flat 4	Conduit Road	Bedford	MK40 1AJ
William S...	1	Flat 5	Conduit Road	Bedford	MK40 1AJ
William S...	1	Flat 10	Conduit Road	Bedford	MK40 1AJ
William S...	1	Flat 11	Conduit Road	Bedford	MK40 1AJ
William S...	1	Flat 6	Conduit Road	Bedford	MK40 1AJ
William S...	1	Flat 7	Conduit Road	Bedford	MK40 1AJ
William S...	1	Flat 8	Conduit Road	Bedford	MK40 1AJ

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.

House Name	House No.	Apartment	Street	Town	PostCode
	11		Conduit Road	Bedford	MK40 1AJ
William S...	1	Flat 1	Conduit Road	Bedford	MK40 1AJ

- 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.

Device	Location	Number	Main	Notes
Telephone	Home	01234 123456	Yes	Answerphone before 6

Address	Location	Main	Notes
jane.smith@btinternet.com	Home	Yes	Only checked every 2-3 days

### Adding a telephone/fax number:

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

**Add Telephone\Fax**

**Telephone details**

Device: Telephone  
Location: Work  
Number: 01234 123456  
Main: Yes  
Notes: Use between 9am and 5pm

OK Cancel

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
Telephone	Work	01234 123456	Yes	Use between 9am and 5pm

Buttons: New, Open, Delete, Set Main

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.

**Add Email**

Location: Home

Address: jane.smith@btinternet.com

Main: Yes

Notes: Only checked every 2-3 days.

Buttons: OK, Cancel

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
jane.smith@btinternet.com	Home	Yes	Only checked every 2-3 days.

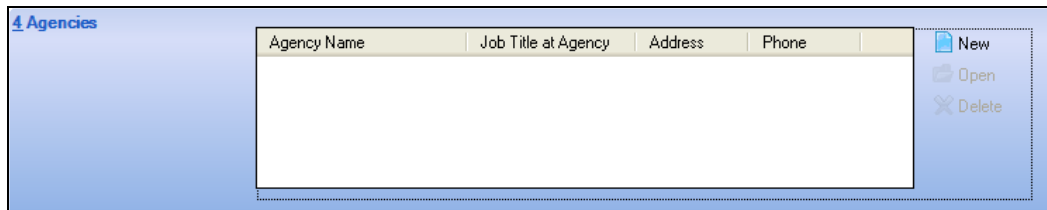
Buttons: New, Open, Delete, Send, Set Main

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.

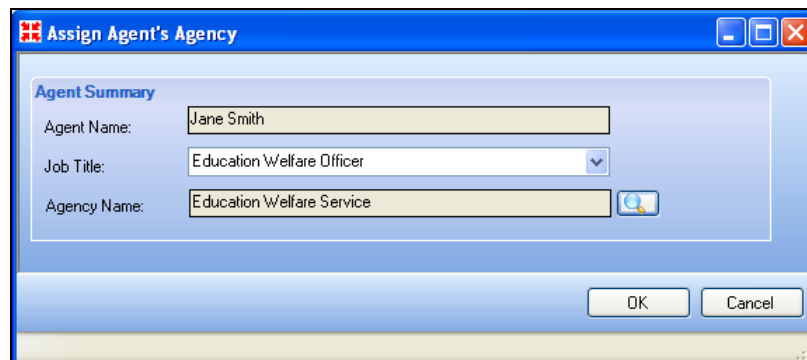
1. Click the **Agencies** hyperlink to display the **Agencies** panel.



Agency Name	Job Title at Agency	Address	Phone
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New  
Open  
Delete

2. Click the **New** button to open the **Assign Agent's Agency** dialog.



**Assign Agent's Agency**

**Agent Summary**

Agent Name: Jane Smith

Job Title: Education Welfare Officer

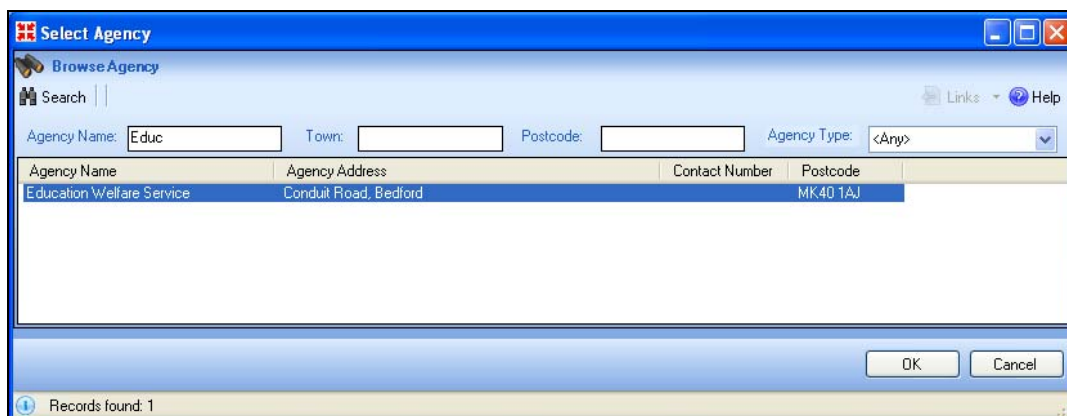
Agency Name: Education Welfare Service

OK Cancel

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*



**Select Agency**

**Browse Agency**

Search | Links | Help

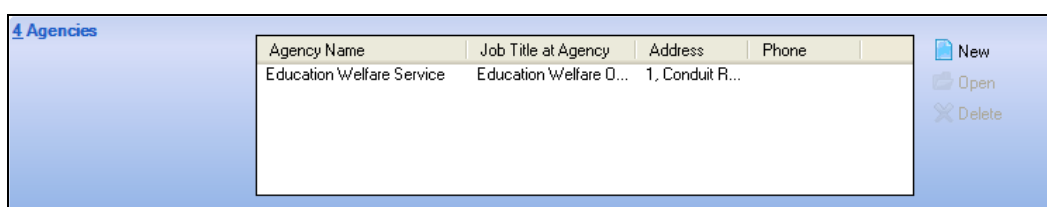
Agency Name: Educ Town: Postcode: Agency Type: <Any>

Agency Name	Agency Address	Contact Number	Postcode
Education Welfare Service	Conduit Road, Bedford		MK40 1AJ

OK Cancel

Records found: 1

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.



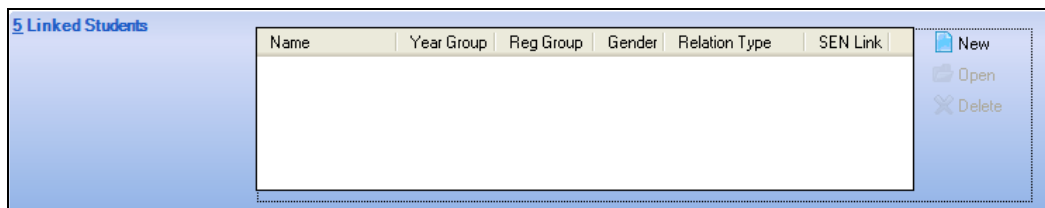
Agency Name	Job Title at Agency	Address	Phone
Education Welfare Service	Education Welfare O...	1, Conduit R...	

New  
Open  
Delete

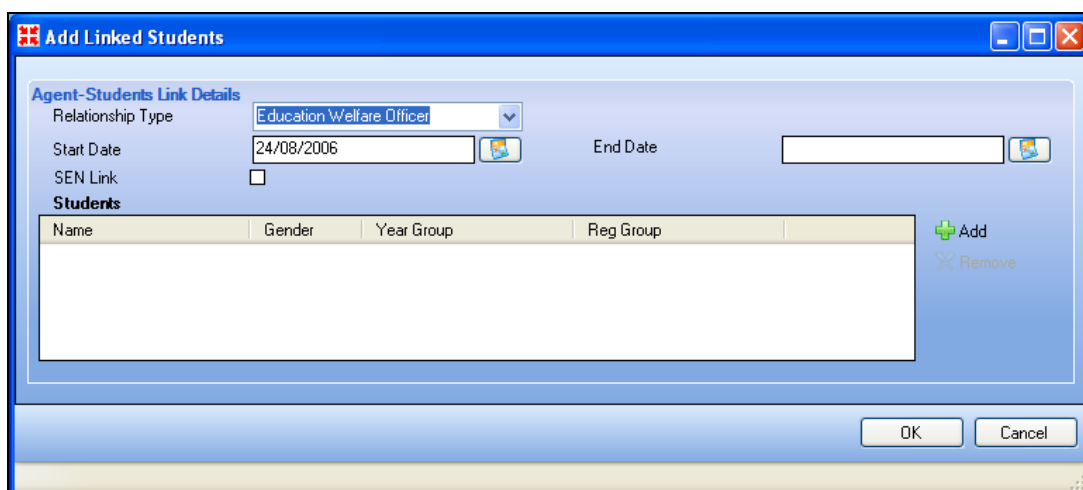


## Adding any linked pupil/students to the agent

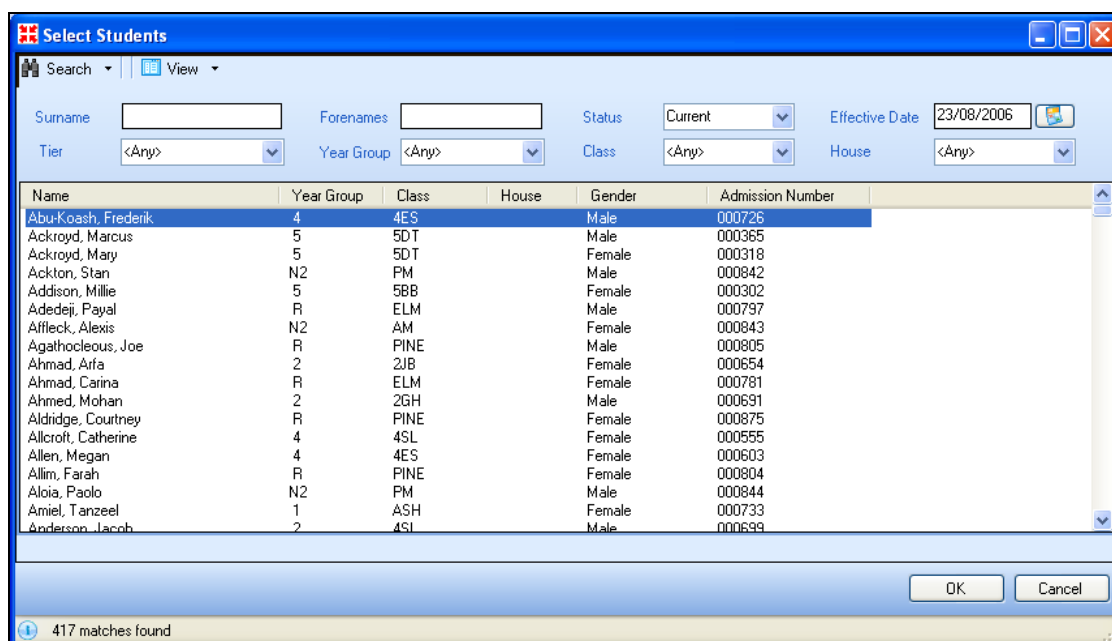
It is possible to associate an agent with one or more pupil/students that they work with. For example, a speech therapist may work with several pupil/students at your school. Linking them to the appropriate agent prevents the need for manually assigning the agent to individual pupil/student records.



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 be 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.



- 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.

Name	Year Group	Class	House	Gender	Admission Number
Abu-Koash, Frederik	4	4ES		Male	000726
Ackroyd, Marcus	5	5DT		Male	000365
Ackroyd, Mary	5	5DT		Female	000318
Ackton, Stan	N2	PM		Male	000842
Addison, Millie	5	5BB		Female	000302
Adedeji, Payal	R	ELM		Male	000797
Affleck, Alexis	N2	AM		Female	000843
Agathocleous, Joe	R	PINE		Male	000805
Ahmad, Arfa	2	2JB		Female	000654
Ahmad, Carina	R	ELM		Female	000781
Ahmed, Mohan	2	2GH		Male	000691
Aldridge, Courtney	R	PINE		Female	000875
Allcroft, Catherine	4	4SL		Female	000555
Allen, Megan	4	4ES		Female	000603
Allim, Farah	R	PINE		Female	000804
Alloia, Paolo	N2	PM		Male	000844
Amiel, Tanzeel	1	ASH		Female	000733
Anderson, Jacob	2	4SL		Male	000699

- 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).
- 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.

Abu-Koash, Frederik	Andrews, Josh	Bauer, Edwin	Buckley, Helena	Cheng, Tao	Dalli, Thabie	Dunn, Laura
Ackroyd, Marcus	Ansell, Richard	Beede, Karl	Burlison, Angus	Ching, Lee	Dambora, Isobel	Easton, Tiana
Ackroyd, Mary	Antas, Sergei	Begum, Ragbir	Burnside, Francesca	Chisenga, Matthew	Das, Annamika	Eccles, Jason
Ackton, Stan	Aperen, Alex	Bellini, James	Burton, Alexander	Choudhury, Nafaz	Davies, Sasha	Efremovska, Natal
Addison, Millie	Araujo, Hitesh	Benito, Eduardo	Cairns, Katy	Christian, Laura	Dawson, Leigh	El Aswar, Jay
Adedeji, Payal	Atlier, Carmela	Bentley, Fran	Caldwell, Ley	Clarkson, Anna	De Souza, Luciana	Elliot, Ben
Affleck, Alexis	Baggley, Chris	Blackmore, Tyson	Candy, Mandy	Clayton, Rosy	Delori, Stephanie	England, Stephani
Agathocleous, Joe	Bagnall, Keith	Bland, Rod	Candy, Milly	Cleaver, Julie	Desai, Tina	Emerson, Sam
Ahmad, Arfa	Bailey, Annalisa	Bliss, Charles	Candy, Molly	Cogman, Stefan	Deveraux, Brandon	England, Stephani
Ahmad, Carina	Baldwin, Steve	Bocci, Sophie	Cangarilevic, Tom	Constantinou, Andreas	Donnelly, Natasha	Erdem, Kaan
Ahmed, Mohan	Balley, Richard	Boman, Chloe	Chadwick, Stephanie	Cook, Greg	Doo, Khan	Estrada, Eric
Aldridge, Courtney	Bandaras, Jose	Bond, Craig	Champa, Rose	Cox, Andrew	Douglas, Chris	Etten, Lucy
Allcroft, Catherine	Bandaras, Maria	Bond, Gloria	Chakma, Bryn	Cox, Toby	Douglas, James	Evans, Callum
Allen, Megan	Barker, Robbie	Bond, Tracy	Chand, Devi	Cracknell, Betty	Dover, Olivia	Fairchild, Arnold
Allim, Farah	Barr, Wendy	Borgia, Matteo	Chang, Xhang	Cundy, Karl	Driver, Ben	Falmer, Katie-May
Alloia, Paolo	Bartlett, Katie	Braithwaite, Darren	Channing, Herbie	Dadar, Liz	Drummond, Tony	Fang, Fiona
Amiel, Tanzeel	Bashir, Karina	Brocklehurst, Clint	Chapman, Seth	Dahl, Nashkabir	Drummond, Vanessa	Fatania, Kalpina
Anderson, Jacob	Basra, Jill	Brown, Jenny	Chaudhry, Sindhu	Dahl, Sandra	Duffy, Astrid	Fawcett, Audrey

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

**Add Linked Students**

**Agent-Students Link Details**

Relationship Type: Education Welfare Officer

Start Date: 24/08/2006
End Date:

SEN Link: ☐

**Students**

Name	Gender	Year Group	Reg Group
Abu-Koash, Frederik	Male	4	4ES
Addison, Millie	Female	5	5BB
Ahmed, Mohan	Male	2	2GH
Allim, Farah	Female	R	PINE
Amiel, Tanzeel	Female	1	ASH
Antas, Sergei	Male	4	4ES

Add
Remove

OK
Cancel

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

5 Linked Students								
Name	Year Group	Reg Group	Gender	Relation Type	SEN Link		New	
Abu-Koash, Fred...	4	4ES	Male	Education Welfa...	No		Open	
Addison, Millie	5	5BB	Female	Education Welfa...	No		Delete	
Ahmed, Mohan	2	2GH	Male	Education Welfa...	No			
Allim, Farah	R	PINE	Female	Education Welfa...	No			
Amiel, Tanzeel	1	ASH	Female	Education Welfa...	No			
Antas, Sergei	4	4ES	Male	Education Welfa...	No			
Bannall, Keith	N2	AM	Male	Education Welfa...	No			

## 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 Centre** 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](mailto: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