

# Managing Agents, Agencies and Contacts

## Adding Agencies and Agents

### Definition of an Agent

An individual who has some involvement in a pupil/student's development or education. They could be doctors, educational psychologists or other external specialists who are being consulted about particular pupil/students.

### Definition of an Agency

An organisation that employs the agents recorded in SIMS. The agency could be an LA Support Team, a doctor's surgery or any other organisation that employs people who are classed as agents in SIMS.

### Adding Agencies and Associating Existing Agents

It is advisable to record all known agencies in SIMS before entering details of the agents who work for them. For example, details of a new doctor's practice should be recorded before the individual doctors are recorded and associated with their employer. Before recording a person in SIMS, please refer to *Recording People in SIMS* in the *Getting Started* chapter of the *Managing Pupil/Students* handbook.

**NOTE:** Linked agencies can also be added via the **Additional Information** panel on the **Pupil** (or **Student**) **Details** page.

### Adding an Agency

1. Select **Focus | Agency | Agencies** to display the **Browse Agency** browser.
2. Search for the agency to ensure it does not already exist. If it does not exist, click the **New** button to display the **Agency Details** page then enter the **Agency Name** in the **Basic Details** panel. Select the **Agency Type** from the drop-down list.
3. Complete the fields in the **Addresses** panel.
4. In the **Contact Information** panel, click the **New** button adjacent to the **Telephones** table to display the **Add Telephone\Fax** dialog. Enter the required details then click the **OK** button to return to the **Contact Information** panel.
5. Click the **New** button adjacent to the **Email Addresses** table to display the **Add Email** dialog. Enter the required details then click the **OK** button to return to the **Contact Information** panel.
6. Add the agency's **Website** address, if known.

**NOTES:** Agency details must be saved before adding agents. Agent associations can be added at a later date, if required.

### Associating Agents with an Agency

1. In the **Agents** panel, click the **New** button to display the **Add Agent for** dialog.
2. Enter the agent's **Surname** and **Forename**, select their **Gender** from the drop-down list then click the **Continue** button.
  - a. If there are people recorded in SIMS who match the criteria entered, their details are displayed in the **Matched People** panel.  
To add an existing person or edit their details, highlight their name then click the **Open** button to display the **Add Agent for** dialog, where the agent's details are displayed. Edit the details, if required, then click the **Save** button. Click the **OK** button to return to the **Agency Details** page.  
To add a new person who has the name and gender previously entered in the **Basic Details** panel, click the **New** button to display the **Add Agent for** dialog. Select their **Job Title** from the drop-down list then click the **Save** button. Click the **OK** button to return to the **Agency Details** page.
  - b. If the person is not currently recorded in SIMS, the **Add Agent for** dialog is displayed. Select the agent's **Job Title** from the drop-down list. Enter the other **Basic Details**, if required, then click the **Save** button. Click the **OK** button to return to the **Agency Details** page.

### Adding New Agents

To indicate their employer, new agents must be associated with an existing agency. Agents can also be added from the agency record, via **Focus | Agency | Agencies**.

1. Select **Focus | Person | Agents** to display the **Find Agent** browser.
2. Click the **New** button to display the **Add Agent** page. Enter their **Basic Details** then click the **Continue** button. If the details entered do not match an existing person recorded in SIMS, the **Agent Details** page is displayed. If the details entered match a person recorded in SIMS, the **Matched People** panel is displayed. If the required person is not displayed in the **Matched People** panel, click the **New** button. If they do exist, highlight their name then click the **Open** button.
3. In the **Basic Details** panel of the **Agent Details** page, enter the agent's **Middle Name(s)**, if known, then select their **Title** from the drop-down list.
4. Enter their **Telephone and Email Addresses** then their **Addresses**.
5. In the **Agencies** panel, click the **New** button to display the **Assign Agent's Agency** dialog.
6. Select their **Job Title** from the drop-down list.
7. Click the **Agency Name Browser** button to display the **Select Agency** dialog. Search for then select the agency you wish to associate with the selected agent. Click the **OK** button to return to the **Agent Details** page.
8. To associate a pupil/student with the agent, click the **New** button in the **Linked Students** panel to display the **Add Linked Students** dialog.
9. Select the **Relationship Type**, enter or select a **Start Date** (if different from today) then select the **SEN Link** check box if the agent is providing additional support for a child with Special Educational Needs.
10. Click the **Add** button adjacent to the **Students** table to display the **Select Students** dialog. Search for and highlight the required pupil/student then click the **OK** button to return to the **Add Linked Students** dialog. Click the **OK** button to return to the **Agent Details** page.
11. Any **Notes and Documents** relating to the agent can also be added.
12. Click the **Save** button.

# Managing Agents, Agencies and Contacts

## Adding, Copying and Cloning Contacts

### Managing Contacts

People recorded in SIMS are considered to be contacts when they are associated with one or more other individuals recorded in SIMS, (e.g. pupil/students or members of staff). Contacts are generally parents or legal guardians of children, and spouses or partners of staff members. It is a statutory requirement for schools to store pupil/student contact information in case of emergencies. Contact information can be recorded as part of the pupil/student record or through the dedicated **Contact details** page. The following instructions demonstrate the use of the **Contact details** page to record pupil/student contact details.

1. Select **Focus | Person | Contacts** or click the **Contacts** icon (located on the quick launch toolbar) to display the **Find Contacts** browser.
2. Search for the contact to ensure that they do not already exist. If they do not exist, click the **New** button to display the **Add Contact** page.
3. Enter their **Basic Details** then click the **Continue** button. If the details entered do not match an existing person recorded in SIMS, the **Contact details** page is displayed. If the details entered match a person recorded in SIMS, the **Matched People** panel is displayed. If the required person is not displayed in the **Matched People** panel, click the **New** button. If they do exist, highlight their name then click the **Open** button to display the **Contact details** page. Enter the remainder of their **Basic Details**.
4. Enter their **Telephones and Email Addresses** by clicking the respective **New** buttons and completing the required fields.
5. Enter the **Addresses** details.  
The new contact must now be associated with the relevant pupil/students recorded in SIMS.
6. Click the **New** button in the **Associated Pupils** (or **Students**) panel to display the **Select Pupil** (or **student**) dialog.
7. Search for then select the required pupil/student(s) and specify their relationship with the new contact, e.g. **Mother**, by selecting from the **Contact Type** drop-down list in the **Contact: Add Student Relationship** dialog.
8. If the contact will be receiving **Correspondence** relating to the selected pupil/student, select the check box. If the contact has **Parental Responsibility** for the child and receives the school's **Pupil Report**, select the respective check boxes.
9. If there is a **Court Order** in place restricting this contact's access to the child, select the check box.
10. Enter the **Priority** for this contact then click the **OK** button to return to the **Contact details** page.
11. Repeat for any other associated pupil/student(s).
12. Specify the new contact's **Language** and **Job Details**.
13. Any notes or **Documents** relating to the contact can also be added. Click the **Save** button to save the details entered.

### Copying and Cloning Contacts

#### Copying Contacts

An existing pupil/student's contact can be associated with a different pupil/student using the Copy Contact routine. For example, a younger sibling may join the school and their contact details are the same as their older brother, who already attends your school. Instead of entering the contact details again, they can be copied.

1. Select **Focus | Pupil** (or **Student**) | **Pupil** (or **Student**) **Details** to display the **Find Student** browser.
2. Search for and select the pupil/student for whom you wish to add contact details to display the **Pupil** (or **Student**) **Details** page.
3. In the **Family/Home** panel, click the **Copy** button adjacent to the **Contacts** table to display the **Copy Contacts** dialog.

4. Search for the pupil/student whose contact(s) you wish to copy, highlight their name then click the **Open** button to display the **Contacts** of page, where the **Contacts** panel is populated.
5. Select the required contact(s) by selecting the check box next to their name(s). Alternatively, select or deselect all displayed contacts by clicking the **Check All** or **Uncheck All** button.
6. When the appropriate selections have been made, click the **OK** button to populate the **Contacts** table in the **Family/Home** panel with the copied contacts.
7. Click the **Save** button.

#### Cloning Contacts

You can re-use some of the basic details of an existing contact and modify their details to create a new contact using the Clone Contact routine. For example, a mother's contact details may be used as the basis of a father's contact record.

1. From the **Family/Home** panel on the **Pupil** (or **Student**) **Details** page, highlight an existing contact then click the **Clone** button.
2. If there are no people recorded in SIMS who share similar details, the **Contact details** page is displayed. If there are people recorded in SIMS who share similar details, the **Matched People** panel is displayed in the **Contact Details** dialog. If the contact you wish to create is not displayed in the **Matched People** panel, click the **New** button. If the required person is displayed, highlight their name then click the **Open** button. Clicking either the **New** or **Open** button displays the **Contact details** page.
3. Complete the information in the **Basic Details** panel. Note that the **Title** and **Gender** offered when creating a **New** contact are the opposite to those of the contact you cloned.
4. If there is a **Court Order** in place restricting this contact's access to the child, select the check box in the **Relationship Details** panel.
5. Enter the **Priority** for this contact, select a **Contact Type** then select or enter any other known information about the contact.
6. Click the **Save** button then click the **OK** button to return to the **Student Details** page.
7. Click the **Save** button.

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