



# Data Management Services

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### Contact Checking Reports

Document Reference DMS080

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# CONTENTS

INTRODUCTION .....	1
CONTACT CHECKING REPORTS .....	2
HfL – Parental Address Not Disclosing .....	2
HfL – Duplicated Parents .....	2
HfL – Correspondence Check .....	4
HfL – Mother & Father at Pupil Address .....	4
HfL – Parental Responsibility Check .....	5
HfL – Salutation/Address Check .....	5
HfL – Parental Email Address Check .....	6
FREQUENTLY ASKED QUESTIONS.....	7
APPENDIX 1 – UPDATE PARENTAL SALUTATION / ADDRESSEE .....	8
APPENDIX 2 – ADDING ADDRESSES AND CONTACTS.....	9
What to do if the House symbol doesn't appear.....	10
Removing and Adding Back an Address.....	10



## Introduction

We have created some reports to assist you in ensuring details of contacts, salutations and addresses etc. are correct and there are no duplications. They can be downloaded from the Reporting page on our website at:

<http://bitly.com/hflreporting>

or

<http://www.thegrid.org.uk/info/traded/sitss/data/reporting/>

Select '**Other Reports**' and download the 'contact\_checks\_.RptDef' file.


If help is required for downloading and importing SIMS reports, from the link above, select **Documents for Download** where you will find a guidance document.

It is recommended that you run the 'HfL – Parental Address Not Disclosing' report, then the 'HfL – Duplicated Parents' report and make any necessary amendments to your database before running the other reports, as these corrections could reduce the number of potential errors highlighted in the other four reports.

It is also advisable to run the **Update Parental Salutation/Addressee** routine to ensure that any blank salutations are created prior to running the 'HfL – Salutation/Address Check' report. Please refer to Appendix 2 on page 9, for details on how to run this routine.

**To be able to run these reports *Third Party Reporting* permission is required. This can be allocated to the relevant staff in SIMS System Manager. Please see document DMS065, available from <http://bit.ly/sysman> or alternatively, via Help on SIMS Home Page. Search for 'Adding a user to an existing group'**

## Contact Checking Reports

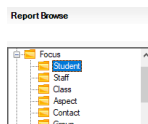
To run these reports go to **Reports > Run Report**, or click the **Run Report**  button, expand the **Focus** menu by clicking on the cross symbol next to it and select either **Student** or **Contact**, depending on the report.



It is recommended that you run each report in turn, making any necessary corrections to your database, before proceeding to the next report in this document.

### HfL – Parental Address Not Disclosing

#### Student Focus



When entering details of a contact to a pupil's record you can select 'Home address can be disclosed'. By removing this tick the address will not be accessible by any reports run from Sims.

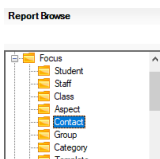
#### *What the report does*

This report looks at all contacts on pupil records with a Relationship of Mother or Father and lists all those where the 'Home address can be disclosed' option has been unticked.

**Note: There may be a valid reason for the address to be set to not disclose – It is advised to check with the contact before amending your records.**

### HfL – Duplicated Parents

#### Contact Focus



When adding a parent to a pupil/student's record it is important to remember that the parent may already exist in your database, as a Contact, Staff member, or Parent to another child. If the parent does exist but is not selected to be attached to the Pupil/Student record, a duplicate contact will be created in the system.









#### *What the report does*

This report looks at all contacts with Parental Responsibility and looks for duplicate entries by comparing certain pieces of information. If two entries have the same Surname, First Initial, Gender and Post Code, but have a different ID number, they will both be highlighted in blue as Duplicated.

You may find that some of the above fields are blank, which will prevent any duplicates from being identified. Such fields will be highlighted in light orange. Please update your database with this missing information and re-run the report, which will allow any additional duplicates to be found and highlighted.

### ***What you should do with entries highlighted in blue***

Once you have verified the duplicate entries you will need to delete them from the pupil/student's record, first ensuring that the contact to remain has all the information held between all the records:

1. Go to **Focus > Person > Contacts**.
2. Browse to the parent that has duplicated records by entering the name in the boxes provided and clicking on **Search**  Search; the oldest version of the contact will appear highest in the list.
3. Compare the information held against each version of the parent, copying any relevant information onto the oldest record, or if the parent is a member of staff, the record that holds their employment details. Check which pupils/students the contacts are linked to under the **Associated Pupils** panel as you will need to ensure the correct version of the contact is linked to each pupil and that the other contacts are removed.
4. Go to **Focus > Pupil > Pupil Details (Focus > Student in Secondary Schools)**, or click on the **Pupil Details**  button, and open the relevant child's record.
5. Navigate to the **Family/Home** panel, select the parent to be removed from the record and click **Delete** .
6. If the correct parent is not listed against the pupil/student, click on the **New**  button to the right of this panel.
7. Enter the details of the parent and click **Continue** .
8. Select the correct parent from the list shown and click **Open** .
9. Add any required information, such as Contact Type, Priority etc, and click **Save** , then **OK**.
10. Click **Save** .

## HfL – Correspondence Check

### Student Focus

By ticking the Correspondence box on a contact you are indicating that the contact would like to be included in any mailings. This is a useful way of identifying parents who do not live at the same address as the child, but would like to receive letters etc.

### ***What the report does***

This report looks to see whether a contact with Parental Responsibility has the same address as the child and whether they have the Correspondence box ticked. If they DO NOT live at the same address and DO NOT have the box ticked they are highlighted in blue.

### ***What you should do with entries highlighted in blue***

You should first check that the contact SHOULD actually be at a different address to the child, and if necessary amend the address on their record. Otherwise, if the contact has indicated that they would like to receive mailings, you should tick the Correspondence box on the contact's record.

### ***Further reports***

Once you have ticked the Correspondence box, you can amend any report so that it will be targeted at those contacts. For more information, please see the document under the heading of **Using the Correspondence box to identify parents not living with students** on the Reporting page on our website (see address on page 1).

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## HfL – Mother & Father at Pupil Address

### Student Focus

### ***What the report does***

The report compares the addresses of contacts who are Mother or Father with the pupil/student's address. If the addresses do not match they are highlighted in blue. The report also identifies addresses that appear the same but have different ID numbers.

### ***What you should do with entries highlighted***

You should first check to see if the parent SHOULD live with the child or not, and then amend their address if necessary. If an entry on the report has 'Duplicated Address' in the rightmost cell, highlighted in light orange, this indicates that the addresses, although appearing to be the same, are in fact duplicated. This can also be identified where you have parents with no house symbol alongside them in the Family/Home panel on the child's record. You will need to remove and add the addresses again as described in Appendix 2.



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## HfL – Parental Responsibility Check

### Student Focus

Mothers and Fathers both usually have Parental Responsibility, unless they are separated or divorced **and** their Parental Responsibility has been legally removed. Other contacts, such as Foster parents and Step parents, may also have been given Parental Responsibility.

### *What the report does*

This report highlights in blue any contacts who are Mother or Father who DO NOT have Parental Responsibility ticked, as this may have been left unticked in error. It will also highlight in green any contacts other than Mothers and Fathers who DO have Parental Responsibility ticked, as this may be an error. This report also has a column indicating whether the contact lives at the same address as the child, for checking purposes, which as above also checks to see if duplicate addresses have been added to your database.

### *What you should do with entries highlighted in blue or green*

If a contact that is a Mother or Father shows in blue then it is likely that this is an error and you should amend their contact record to include Parental Responsibility, unless you have been made aware to the contrary. If another type of contact is shown in green then you need to check that they should indeed have Parental Responsibility assigned to them.

If you have any entries marked as having a 'Duplicated Address', as with the previous report, please refer to Appendix 2 for correction.

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## HfL – Salutation/Address Check

**If you haven't already, please refer to Appendix 1 (page 8) and run the Update Parental Salutation / Addressee routine prior to running this report.**

### Student Focus

When you generate Parental Salutations, the system checks to see if the parents live at the same address as the child AND have Parental Responsibility and then creates an appropriate salutation. If the parent's address is a copy of the child's address, rather than the same address (it may look exactly the same however), then the salutation will not be generated correctly.

### *What the report does*

The report looks at what the current Parental Salutation is compared with what it SHOULD be, based on whether the Mother and Father live at the same address as the child and whether they have Parental Responsibility or not. It then highlights those with differences in blue.

### ***What you should do with entries highlighted in blue***

You should first check to see if the Parental Responsibility is correct or not, and if necessary amend the contact's record. If the addresses look the same, but the salutations are different, then it could be that the child and contacts are at different versions of the same address. These entries will be marked as having a 'Duplicated Address', and as with the previous reports, you should refer to Appendix 2 for correction. Once these are corrected, you will need to run the routine found under **Routines > Pupil > Update Salutation / Addressee > Parental (Routines > Student in Secondary Schools)**, and then re-run the report.

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## **HfL – Parental Email Address Check**

### **Contact Focus**

If you are using a software package that extracts email addresses from SIMS it is necessary to have a valid email address for each contact.

### ***What the report does***

The report lists all contacts that have Parental Responsibility ticked and lists any email addresses detailed on their record. If the contact has NO email addresses the cell will be highlighted tan. If an email address does not appear to be in the correct format (i.e. *something@something.something*) it will be highlighted blue. This can occasionally happen during CTF import from another school.

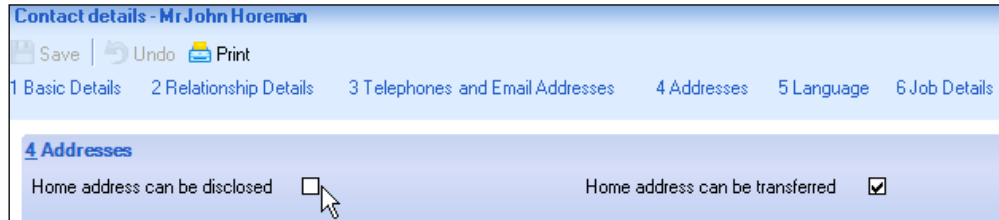
### ***What you should do with entries highlighted***

You should arrange to collect a valid email address for each contact highlighted. Those which are marked as being in an invalid format should be confirmed with the contact and amended as necessary.

## Frequently Asked Questions

**Q. Why do I have a blank address showing on the reports for a parent but when I look in the pupil's record there is an address against the contact?**

A. If you look at the Addresses panel on the contact you will see a tick box at the top stating 'Home address can be disclosed':




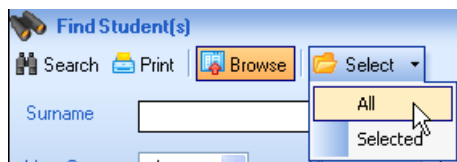
If this box is unticked the address will not show on any reports you run from SIMS. First check to see if the parent/s have requested not to have their address disclosed and if this is **not** the case, tick the box. Then re-run the reports.

**Q. Why when I run a report is the information showing in the wrong columns and missing the IDs?**

A. This will occur if the user running the report does not have Third Party Reporting permissions allocated to them. Please refer to 'Allocating User Permissions in System Manager' on Page 1.



## Appendix 1 – Update Parental Salutation / Addressee

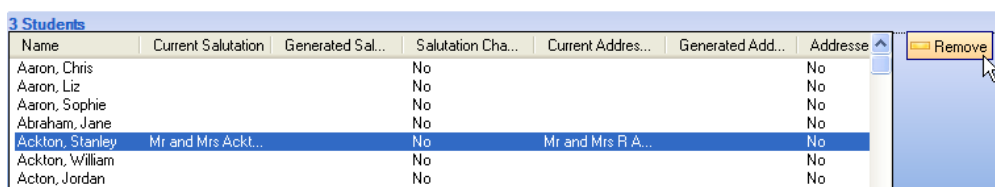
1. Select **Routines > Pupil > Update Salutation / Addressee > Parents (Students in Secondary Schools)**.
2. Click on the **Search**  **Search** button.
3. Click on the drop-down next to the **Select** button and choose **All**. This will populate the **Students** panel.



4. Tick all three boxes in the **Options** and **Overwrite Options** panels.

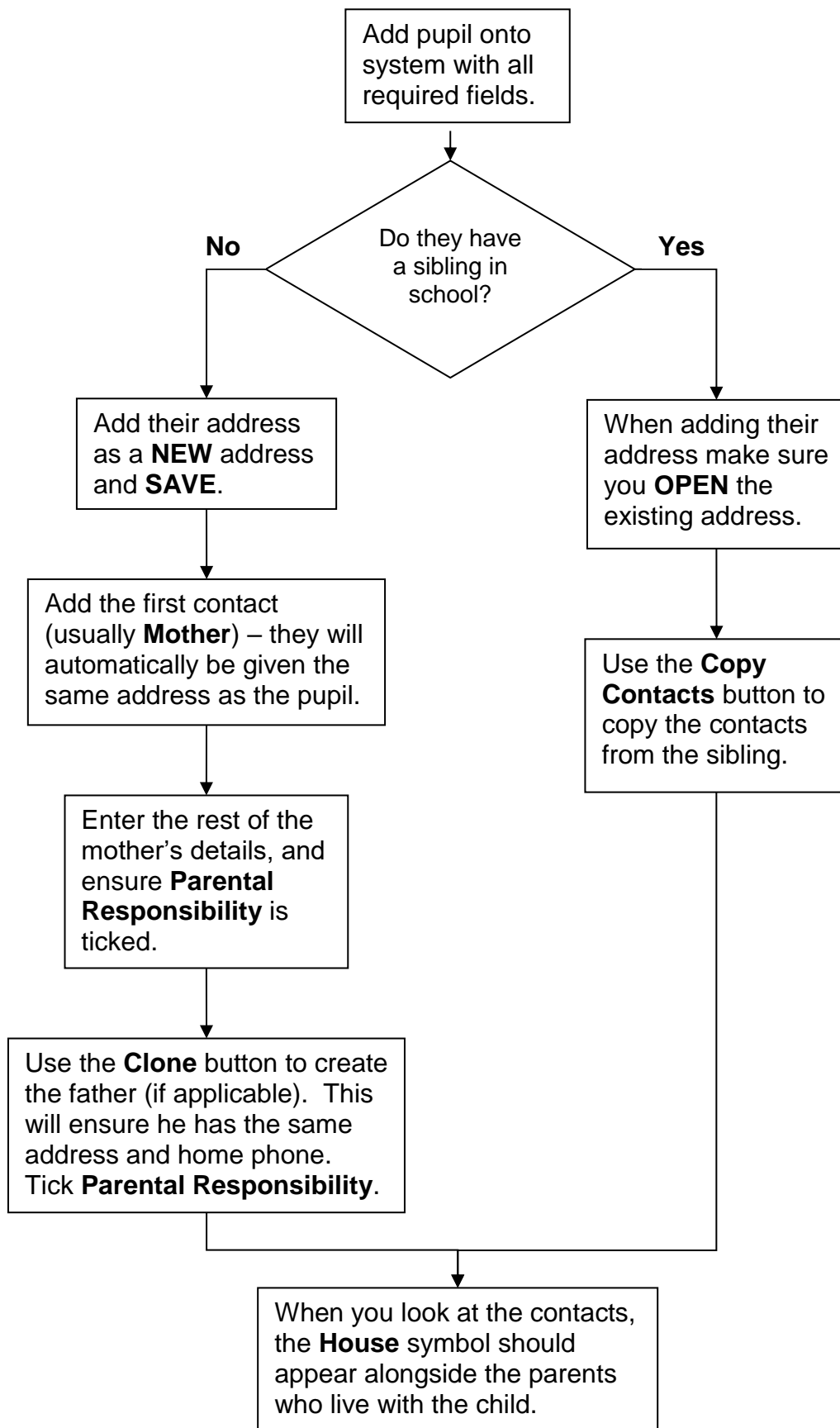


5. Click on the **Generate**  **Generate** button. This will update the **Students** panel to show both the **Current Salutation/Addressee** and the **Generated Salutation/Addressee** for your review.
6. Running this routine will overwrite any manually entered salutations already in SIMS (i.e. the salutation and addressee relates to a step or foster parent) and so it is possible to remove any children where manual salutations are present or where the **Current Salutation/Addressee** is correct. To remove a pupil, select the pupil and click on the **Remove**  **Remove** button.



Name	Current Salutation	Generated Sal...	Salutation Cha...	Current Addres...	Generated Add...	Adresse	Remove
Aaron, Chris			No			No	
Aaron, Liz			No			No	
Aaron, Sophie			No			No	
Abraham, Jane			No			No	
Ackton, Stanley	Mr and Mrs Ackt...		No	Mr and Mrs R A...		No	
Ackton, William			No			No	
Acton, Jordan			No			No	

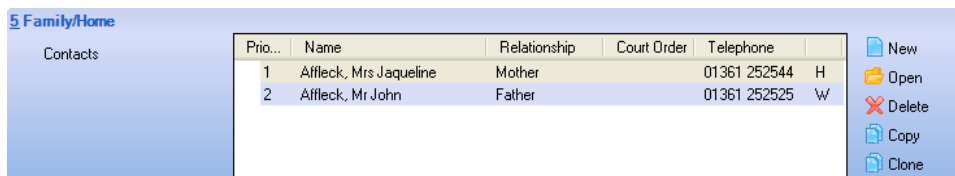
7. Click **Save**  **Save**. All of the pupil/student records will now be updated.

**Appendix 2 – Adding Addresses and Contacts**

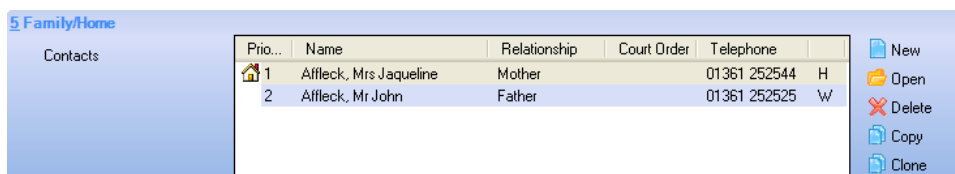
## What to do if the House symbol doesn't appear

If you know that a parent is at the same address as the child but they don't have the house symbol, then it could be that they are at another copy of the address. To rectify this:


**FIRST** identify whether the child has a sibling or not, and if so whether the House symbol appears alongside the contacts on the sibling – if they do, then it is likely to be the address on the original child that is incorrect. If they do not have a sibling, then edit the address on the child anyway.

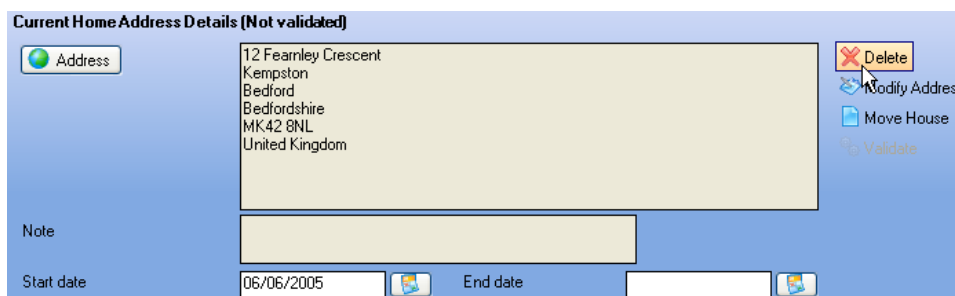


If the house symbol appears alongside one parent and not the other, then the address on the contact with no house should be changed following the steps below.

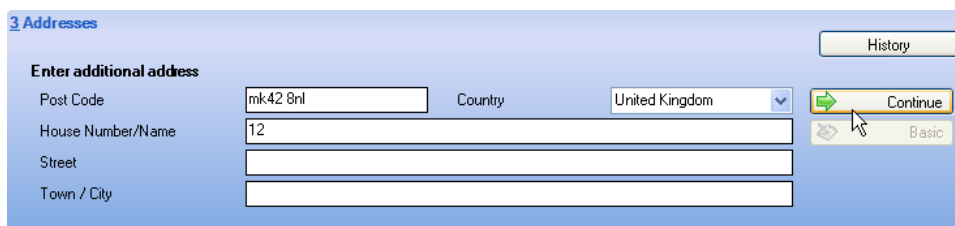


## Removing and Adding Back an Address

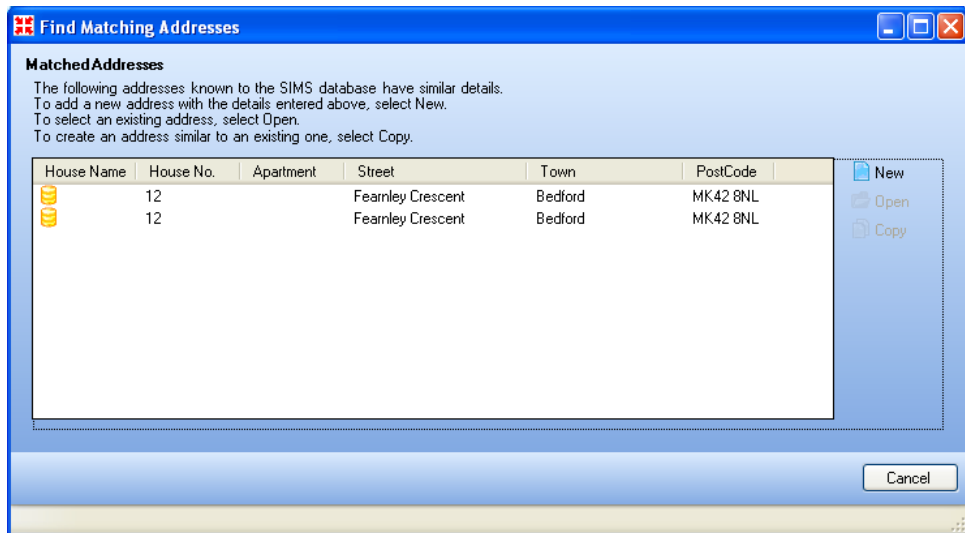
1. Make a note of the postcode and house number of the address to be removed, plus the start date, then delete the address by clicking the **Delete**  button alongside it.



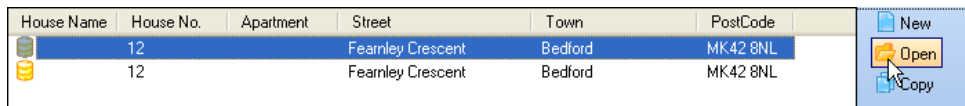
2. Enter the postcode and house number again and click **Continue** .



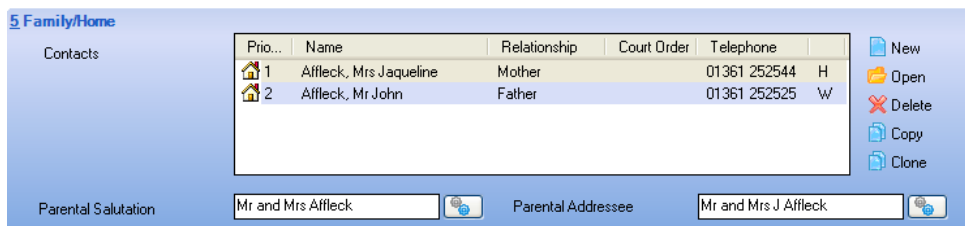
3. You will then be offered 2 (or more!) versions of that address.




4. Select the first version of the address and click **Open** .



5. Enter the **Address type (Home)** and the start date noted in step 1 above. **Save** the record. If the houses now appear by the contacts, then you have selected the correct version of the address. If they do not, then you will need to repeat the steps above and select the second version of the address at step 4.



6. If a contact still doesn't have the house symbol, check that parental responsibility is ticked. If that doesn't bring the house in, then try deleting the address from that contact and adding it again as above.
7. You should then be able to use the **Generate**  buttons alongside **Parental Salutation** and **Parental Addressee** to update those fields correctly.



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