Single Central Record

EPM Connect Guide

Document Control

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Document Approval
The Director of Operational Excellence shall review this guide annually and shall determine whether any further changes need to be made prior to approval.

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Single Central Record Guide

The Single Central Record allows you to effectively track and manage statutory safeguarding checks for all employees, Governors and Trustees, volunteers, agency staff and other individuals. Easily view incomplete records and additional metrics and infographics regarding your SCR Status and have confidence that your school and or Trust is compliant.

The information within the **Single Central Record** is compiled from the information entered within the **Pre-Employment Checks** section of each **Employee Record**. The **Single Central Record** module provides an overview of all employees, displaying the overall status of the SCR and highlighs any incomplete data, whilst also providing a detailed SCR report across the entire organisation.

General Guidance

All SCR details are managed at individual school property level but can be viewed at both school and trust level.

Column headings in a bold text with a magnifying glass icon can be filtered or sorted alphabetically, chronologically, or numerically depending on the content of the column. To sort the column, click on the column heading. Click a second time to reverse the sorting.

To search in a column, click on the magnifying glass in the header of the column you want to search. From the drop-down list, select the rule for your search then add the criteria in the text box below.

Summary (including Metrics)

The **Summary** section of the module provides a variety of metrics, including overall SCR Status, Incomplete Records, Individuals and Employees on SCR and an overview of incomplete records, broken down by check type.

The Summary provides a

1. On the left-hand side of the EPM Connect window, select **Single Central Record**. A list of further menu options will appear.
2. Select **Summary**. The **Single Central Record** page is displayed.
3. View the key headline metrics displayed across the top of the screen.
4. To view more details, click the arrow in the top right of any of these metrics to move into specific details.
5. Scroll down to view **Individuals on SCR By Type** and a list of **Incomplete Records**.

View SCR Records

1. On the left-hand side of the EPM Connect window, select **Single Central Record**. A list of further menu options will appear.
2. Select **Details**. The **Single Central Record** page is displayed. This will show all SCR records for all employees and other individuals, including volunteers.

   Incomplete checks are highlighted in pink.

   Complete details are highlighted in green.

   Whenever you add an employee to the system they will be added to the SCR. However, should you wish to add **Governor/Trustees, Volunteers, Agency Staff** or **Contractors** these need to be added individually.

3. Select the **Employees** tab to view all the employees and the **Governor/Trustees, Volunteers, Agency Staff** or **Contractors** tabs to view the SCR records of the individuals within those categories.
4. Once within your chosen tab you are able to view the **Name, Type** *(Employee, Governor/Trustees, Volunteers* etc), **Role, Start Date, Status** (*Complete* or *Incomplete*) and any **Incomplete Checks**.

   If all checks are complete, the **Incomplete Checks** will show simply as ***Complete***.

5. Hover over **Incomplete Checks** within the line of the individual you are looking at and it will provide more information – for example **Date Checked Missing, Checked By Missing** etc. This will include when any of these checks have expired.

   Any check that has a ~ next to it denotes a check that must be completed for the status of the record to be marked as **Complete**.

6. Click on the name of any individual with missing checks. This will take you to the individual's record.

   For example, for **Identification Check**, view whether **Identification Check Complete**, **Type of Identification Seen**, **Date Checked**, **Expiry Date**, who the identification was **Checked By**, **Status** and any **Notes** recorded.

7. The module itself will automatically require the **Identification Check, The Right to Work in the UK Check** and the **DBS Check**.

View Previous Records

The module allows you to view previous records of ex-employees and individuals.

To view previous records, click the **View Previous** button. The section expands.

Complete checks within the SCR Module

1. On the left-hand side of the EPM Connect window, select **Single Central Record**. A list of further menu options will appear.
2. Select **Details**. The **Single Central Record** page is displayed. This will show all SCR records for all employees and other staff, including volunteers.
3. Select the **Employees** tab to view all the employees and the **Governor/Trustees, Volunteers, Agency Staff** or **Contractors** tabs to view the SCR records of the individuals within those categories.
4. Hover over the **Incomplete Checks** within the line of the individual you are looking at and it will provide more information – for example **Date Checked Missing, Checked By Missing** etc. This will include when any of these checks have expired. Any check that has a ~ next to it denotes a check that must be completed for the status of the record to be marked as **Complete**.
5. Click on any individual with missing checks. This will take you to the individual's record.

   The module will automatically require an **Identification Check, The Right to Work in the UK Check** and a **DBS Check** for all **Employees**. This is not the case for other individuals such as **Governors** and **Volunteers**. For these individuals scroll down and tick the box next to any of these checks that are relevant.

6. Complete the details within each check, for example for **Identification Check**, tick whether **Identification Check Complete**, complete the details within **Type of Identification Seen, Date Checked, Expiry Date,** who the identification was **Checked By, Status** and any **Notes** recorded.

   Any field that has a ~ next to it denotes a check that must be completed for the status of the record to be marked as **Complete**. If you simply mark a check as being complete but do not complete any other details, or fail to complete any of the fields denoted by a ~ it will not be seen as **Complete**.

   For checks where the check is not possible to complete, or still pending, but a risk assessment has been put in place to allow an immediate start, a status reflecting this situation can be selected.

7. Scroll down and select any additional checks required for this individual by clicking on the box on the far right side of the check. A new window is displayed.
8. Complete the details and once finished scroll to the bottom and click **Save** to finish.

9. Once all relevant checks have been completed the **Status** for this individual will change to **Complete**.

Audit Trail

The **Audit Trail** in the **Employee Record** will record every change made to the Single Central Record. This allows you to see when and who undertook the check and manage any necessary follow up conversations.

Create additional checks (not already in the system)

Should the check you wish to enter not be in this list these can be created in the **Settings** area of the **Employees** module. This ability will depend on the permissions of the user.

Any **Other Checks** added to the system will be recorded within **ID and Other Checks** within the **Employees** module and within the **SCR Module** and the **SCR Report** as long as the check is assigned to at least one employee and is ticked as an **Other Check** to include within the SCR, within **SCR Settings**.

1. On the left-hand side of the EPM Connect window, select **Employees**. A list of further menu options will appear.
2. Select **Settings**. The **Employees** page is displayed. This will show all SCR records for all employees and other staff, including volunteers.
3. Select the **Other Checks** tab.
4. Click **+ Create Other Check.** A new **Add/Manage Other Check** window is displayed.

5. In the **Other Create Title** text box, enter a title.
6. Tick whether the check **Requires Certificate** and **Requires Expiry**. If ticked, this will appear across all individuals.
7. If you wish to assign the check to specific individuals, in the **Assign** box, add the individual's email address.
8. Alternatively, click in the box next to **User Groups** and choose from the user groups listed within the drop down menu.
9. Click **Save** to finish.

10. You will return to the **Other Checks** page in **Settings**. Here you can view the number of **Linked Employees** next to each check.

    Once a check has been undertaken for any individuals it cannot be amended but can be deleted by clicking the red cross next to the check listed here.

11. Once created, any of these additional checks will appear in **Employees > Details > ID & Other Checks** at the bottom of the page under **References**.
12. You will also find **Driving Licence, Passport** and **Visa Details** here.

Troubleshooting

Should a check show as incomplete, any field that has a ~ next to it denotes a check that must be completed for the status of the record to be marked as Complete. If you mark a check as being complete but do not complete any other details, or fail to complete any of the fields denoted by a ~ it will not be viewed by the system as Complete.

Add an individual to the Single Central Record

All employees will be added to the Single Central Record by default; however, Volunteers, Governors/Trustees, Agency Staff and Contractors will need to be added manually. To do this, follow the steps below:

1. On the left-hand side of the EPM Connect window, select **Single Central Record**. A list of further menu options will appear.
2. Select **Add Individual**.
3. Complete the fields within the form. If you are missing details (for example if the member of staff has not yet started), complete all the details you can, ensure you have completed the mandatory details denoted with an * and click **Save** to finish. You can then return to the form later.

   Save

   The module will automatically require an **Identification Check, The Right to Work in the UK Check** and a **DBS Check** for all **Employees**. This is not the case for other individuals such as *Governors* and *Volunteers*.

4. Scroll down and tick the box next to any of these checks that are relevant and complete the information within them.
5. If someone else has completed the checks on the school/Trust's behalf, click the **Written confirmation received that all relevant checks completed** box and add the **Date Received**, choosing a date from the calendar.
6. To add documents, click the **Documents** tab at the bottom of the page and click the **+ Add Document** button. This can only be actioned after the individual's record has been saved.

   + Add Document

7. You can also view the **Audit Trail** by clicking on the blue **Audit Trail** tab.
8. Click **Save** to finish.

   Save

9. The individual will now appear within the relevant tab within the **Details** page.

Import Single Central Record data en masse

The **Import SCR** function can be used to initially import your current SCR and also to import mass changes. The method used to import is the same used for **Import** Employees and **Import Absences**.

1. On the left-hand side of the EPM Connect window, select **Single Central Record**. A list of further menu options will appear.
2. Select **Import SCR**. The **Single Central Record** page is displayed. This will show all SCR records for all employees and other staff, including volunteers.
3. Tick the **Column Headers Only (No Data)** box if you wish to download with spreadsheet without any data in it.

   This will allow you download the spreadsheet without data. This should be used the first time the data is uploaded. Leave this box unticked for subsequent uploads, as this will allow you to upload changes and new records.

4. From the Sort Employees By drop-down menu, select the option you require.

   This will allow you to view the data in the format you require.

5. Click the **Download Import Spreadsheet** button.

6. A **Downloading - please wait** message will appear.

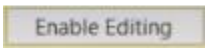
   

   Once downloaded an Excel spreadsheet will open. If this does not open, go to your Downloads and open the most recent document.

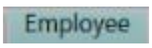
   This document is the document that you will update with the data that you wish to import.

7. Click the **Enable Editing** button in the top yellow bar of the document. This will open an instructions page. Read this carefully.

   Please note any columns highlighted in a peach tone denote a **Key** Column and must not be changed.

8. Click on the relevant tab at the bottom of the spreadsheet for example the **Employees** tab.

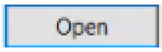
9. The spreadsheet will be pre-populated with any information held within the system. Scroll through the columns and add information to any blank cells.

   Each individual already within the system will already have an **Individual Key** set up. For new employees or individuals once uploaded an **Individual Key** will be created, so this can be left blank. Re-look at the **Instructions** tab to check the formatting information that applies to each coloured cell.

10. Save the document by clicking **File > Save** and return to the EPM Connect screen.

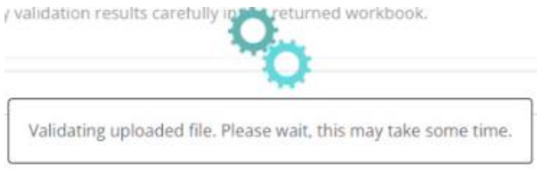
11. Scroll down to the **To Import Your Data** section and click the **Choose File** button. This will open up a new **Open** window.

12. Go to **Downloads** and open up the last file you downloaded and click **Open** at the bottom of the window. You will return to the main screen.

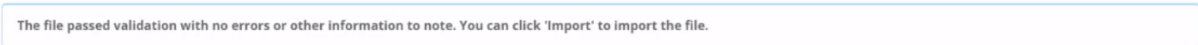


13. Click the green **Validate** button and the system will check the document through for any warnings or errors within the document.

14. A message will appear to show the document is being checked.



15. A message will appear to show if the file has passed validation.



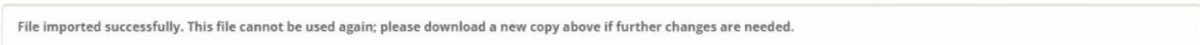
There are rarely any warnings within this spreadsheet, however if there are any errors or warnings a list of these will appear.

16. If this message appears click the **Import** button.

17. A **Confirm Import** window will appear. Please be aware that any information you have changed within the spreadsheet will overwrite any information in the system, if you do not wish to over-ride these changes click **Cancel** or to override these, click **Import**.

18. A message will appear whilst the system imports the information and the data within the spreadsheet will be imported into the module.

19. Once the information is imported you will see the following message within the screen:



20. To view the details you have added, go to the left-hand side of the EPM Connect window and click **Single Central Record**. A list of further menu options will appear.
21. Click **Import SCR**. The **Single Central Record** page is displayed. This will show all SCR records for all employees and other staff, including volunteers.

Once imported the spreadsheet you have used before cannot be used again. Therefore, should you need to repeat the process you will need to repeat the process again, downloading the spreadsheet again.

Reports

Reports can be found within the **Details** page of the SCR module. These reports provide you with the detail contained within each employee's SCR record all within a single report. For example, DBS number the checks undertaken, who undertook them and the date they were undertaken.

1. On the left-hand side of the EPM Connect window, select **Single Central Record**. A list of further menu options will appear.
2. Select **Details**, the **Details** page is displayed. This will show all SCR records for all employees and other staff, including volunteers.
3. Click the **Reports** button at the top of the screen.

This report button is available on every page within the Single Central Record module.

4. A list of further menu options will appear. Select **Single Central Record** or **Single Central Record Inc Prev Roles** from the drop-down list.
5. The relevant report will download and appear in your download folder within your main computer files.
6. Go to your files, click **Downloads** and open the report.

You are unable to upload any changes made to this document. If you wish to import details, follow the steps described in Importing Data En-masse above.

Share SCR Records

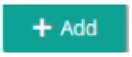
There may be situations where a member of staff occasionally works at another school within a Trust. Their information will sit within the School property in which the member of staff is based, however this information can be shared with any additional schools within the Trust should the member of staff visit another school.

1. On the left-hand side of the EPM Connect window, select **Trust Overview**. A list of further menu options will appear.
2. Select **Single Central Record**. A list of further menu options will appear.
3. Select **Details**, the **Details** page is displayed.
4. Find the member of staff you wish to share SCR information for and click the eye icon on the far right hand side of the member of staff listed. **Share SCR Record** is displayed.

This will display the properties they are currently linked to and provide the option to add them to a further property (school).

5. Click **Please Select** under **Choose a property** and choose from the properties listed.

6. Click the **+ Add** button to link them to this property. The record will now be shared with the additional property.

   The member of staff will be listed multiple times within the Trust SCR record, with the names of the property listed against each record.

Settings

This page allows you to customise your SCR, including displaying your other checks from the Employees Module.

1. On the left-hand side of the EPM Connect window, select **Trust Overview**. A list of further menu options will appear.
2. Select **Single Central Record**. A list of further menu options will appear.
3. Select **Settings**, the **Settings** page is displayed.
4. Select the settings that apply by ticking the appropriate boxes.
5. Click **Save** to finish.

Trust Overview

Trusts can view the **SCR** across the entire trust via **Trust Overview**, both within the **Summary** and **Details** sections.

Summary (including Metrics)

The **Summary** section of the module provides a variety of metrics, including overall SCR Status, and a breakdown of the status of each individual property (school) within the Trust.

1. On the left-hand side of the EPM Connect window, select **Trust Overview**. A list of further menu options will appear.
2. Select **Single Central Record**. A list of further menu options will appear.
3. Select **Summary**. The **Single Central Record** page is displayed.
4. View the overall status and key headline metrics.
5. To view more details, click the arrow in the top right of any of these metrics to move into specific details.
6. Scroll down to view **Individuals on SCR By Type** and a list of **Incomplete Records**.

View SCR Records

1. On the left-hand side of the EPM Connect window, select **Trust Overview**. A list of further menu options will appear.
2. Select **Single Central Record**. A list of further menu options will appear.
3. Select **Details**. The **Single Central Record** page is displayed. This will show all SCR records for all employees and other individuals, including volunteers.

   Whenever you add an employee to the system they will be added to the SCR. However, should you wish to add **Governor/Trustees, Volunteers, Agency Staff** or **Contractors** these need to be added individually.

4. Select the **Employees** tab to view all the employees and the **Governor/Trustees, Volunteers, Agency Staff** or **Contractors** tabs to view the SCR records of the individuals within those categories.
5. Once within your chosen tab you are able to view the **Name, Type** *(Employee, Governor/Trustees, Volunteers* etc), **Role, Start Date, Status** (*Complete* or *Incomplete*) and any **Incomplete Checks**.

   If all checks are complete, the **Incomplete Checks** will show simply as ***Complete***.

6. Hover over **Incomplete Checks** within the line of the individual you are looking at and it will provide more information – for example **Date Checked Missing, Checked By Missing** etc. This will include when any of these checks have expired.

   Any check that has a ~ next to it denotes a check that must be completed for the status of the record to be marked as **Complete**.

7. Click on any individual with missing checks. This will take you to the individual's record.

For example, for **Identification Check**, view whether Identification **Check Complete**, **Type of Identification Seen**, **Date Checked**, **Expiry Date**, who the identification was **Checked By**, **Status** and any **Notes** recorded.

8. The module itself will automatically require the **Identification Check, The Right to Work in the UK Check** and the **DBS Check**.

View Previous Records

The module allows you to view previous records of ex-employees and individuals.

To view previous records, click the **View Previous** button. The section expands.

Share SCR Records

The Trust Overview of the SCR Module allows you to share SCR records with other schools within the Trust. This is useful when there are individuals or employees that work in multiple schools.

1. On the left-hand side of the EPM Connect window, select **Trust Overview**. A list of further menu options will appear.
2. Select **Single Central Record**. A list of further menu options will appear.
3. Select **Details**. The **Single Central Record** page is displayed. This will show all SCR records for all employees and other individuals, including volunteers.

4. Select the relevant tab.
5. Click the icon on the far right-hand side of the employee's or individual's record you wish to share. A new window is displayed.

   Current Property Links displays the schools that currently have access to this record.

6. From the **Choose a Property** drop-down menu, select the property with which you wish to share the record.
7. Click **+ Add**. The window closes and the record is shared.