

Running contact reports for contact tracing

The following reports can be used to help gather pupil and staff close contact information for PHA.

- Generate a separate close contact list for each positive case being reported
- It is important that information on the report is checked and accurate - contacts not required can be removed from the report. Ensure all columns have been populated e.g. DENI Number, School Name and Status

It is the school's responsibility to ensure the data is accurate. When the information is checked and additional data recorded the report can be uploaded to PHA using the AnyComms+ website.

Running the pupil PHA - close contacts report

In SIMS

- Select **Reports | Run Report | Focus | Student**
- Highlight **PHA – close contacts proforma Excel** and click **Run**
- At **Year group**, tick the required **Year(s)**
- At **Reg group**, tick the required **Reg group(s)**

Depending on the close contact pupils you may need to select multiple Years and/or Reg groups and then manually remove unwanted pupils from the report.

- Click **OK**
- Click **Enable Content** if prompted

The report will display **1 contact** who has **parental responsibility** and **lives with the pupil** – not necessarily the Priority 1 contact. Depending on how the contacts were entered it is possible that for siblings different parental contacts may be shown. For checking purposes, the Parent/Guardian Name and Relationship details are displayed – these columns should be removed from the report after checking.

Removing non close contact pupils

- Highlight any rows with pupils that are not required - the Ctrl and/or Shift keys can be used to select multiple rows
- Right click and select **Delete**

Checking data

Check the **Relationship** column for unusual or unexpected details, eg Grandparent or Childminder.

The contacts displayed on the report all have the *Parental Responsibility* box ticked. If someone other than a parent/carer is displayed then this contact record will need to be checked and *Parental Responsibility* box unticked if required.

The report will display the contact's number if the *Location = Mobile*. If the Mobile number is missing check the Contact record.

If the mobile number is recorded but the location is not mobile, eg *Location = Home* then the number will not be displayed on the report, eg

Device	Location	Number	Main	Primary
Telephone	Home	07764258935	Yes	Yes

Update the location to mobile if required.

If any changes are made to the pupil record then rerun the report.

Saving the report

When data has been checked the report can be saved

- Select **File** and **Save**
- Browse to a secure area, eg Private folder, enter a **File name** which identifies the positive case to PHA, eg *Pupil Name and Date*
- Click **Save**

Additional Formatting Tasks

Entering the DE Number and School Name

The school DE Number and Name should be entered against each pupil on the report

- Type your **School DE Number** in cell **A2**
- Highlight the **DE Number** and click and drag down to the last row containing pupil information
- Ensure the **Home** menu is selected
- In the **Editing** panel, click  and select **Down** to copy the DE Number
- Type your **School Name** in cell **B2**
- Highlight the **School Name** and click and drag down to the last row containing pupil information
- Ensure the **Home** menu is selected
- In the **Editing** panel, click  and select **Down** to copy the School Name

Changing the Date of Birth format

- Highlight the **Contact Date of Birth** column
- Right click and select **Format Cells**
- Under **Category** select **Date**
- Under **Type** select the format **dd/mm/yyyy**, eg 14/03/2012
- Click **OK**
- Then select the **Data** menu



- In the **Data Tools** panel, click **Text to Columns**
- Click **Next** and **Next** again to move to **Step 3 of 3**
- Under **Column data format** select **Date**
- Click **Finish**

Completing the Status column

- In the **Status** column enter **Student**
- The *Fill Down* function (used to copy the DE Number and School Name) can be used to copy the information for all pupils

Removing the Parent/Guardian Name and Relationship columns

- Highlight the **Parent/Guardian Name** column and the **Relationship** column
- Right click and select **Delete**
- **Save** the changes when finished

Running the PHA – Staff close contacts proforma report

The following report can be run to gather staff contact information. If required, staff information can then be copied to be included on pupil report.

- Select **Reports | Run Report | Focus | Staff**
- Highlight **PHA – Staff close contacts proforma** and click **Run**
- Select the required parameters as follows:

At Teaching Staff:

Select **True** to display all Teaching staff

OR

Select **False** to display all Non-Teaching staff

OR

Tick **Accept All (bypass filter condition)** to display all staff details

OR

If only 1 member of staff details is required tick **Accept All (bypass filter condition)** and type their **Forename** and **Surname** in the relevant boxes

- Click **OK**
- Click **Enable Content** if prompted

The report will display current staff along with a mobile number and address if recorded. If information is missing check the Personnel record.

- Highlight any rows with staff that are not required - the Ctrl and/or Shift keys can be used to select multiple rows
- Right click and select **Delete**
- Change the **Date of Birth format** as before

If only staff details are needed for PHA then insert 2 columns at the start of the report with the headings **DE Number** and **School Name** and complete.

Staff details can be copied to the pupil report as follows:

- Ensure the pupil report has been saved and is open
- Click and drag to highlight the relevant staff information (do not highlight the whole row)
- Right click and select **Copy**
- Open the pupil report
- Click in the next row in the **Contact First Name** column (column D)
- Right click and select **Paste**

If a member of staff has tested positive for Covid then move the details to the top of the list

- Ensure the **DE Number**, **School Name** and **Status** columns are completed
- **Save** the report

Uploading the Report to AnyComms +

- Open an internet browser and enter the URL <https://c2k.anycommsplus.avcosystems.com/Login.aspx>
- Enter your AnyComms+ **Username & Password**
- Click **Login**
- Click **Upload to Local Authority** from the panel on the left hand side
- Click **Select Files**
- Browse to the saved report, select the file and click **Open**
- Under **File Type**, select **PHA Close Contact**
- Under **Service**, select **PHA Track and Trace**

File Name	File Type	Service
Test File.xlsx	PHA Close Contact	PHA - Track and Trac

- Click **Upload Files**

NB It is important to select the correct Service to prevent files being sent to the wrong destination

The **Transfer History** menu can be used to check files you have transferred within the last 12 months.

For further queries or support please contact the C2k Service Desk 0870 6011666 (or alternatively to log a call via the Online Service Desk refer to Information Sheet EN040)