

Momentum ESR – Guide to Welfare for Admin Level Users (2019)

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Key

(Bold)

Example of use

Bold text represents Menu Items, Headings, Tabs, Text and Icons that you will be able to see verbatim on screen. See the below Examples of Use also

(>) means menu selection pathway

Example of use

The sentence - Select the Admin tab, then select the Import menu item and then select Import Students would be represented as select **Admin>Import>Import Students**

(-) means page heading pathway

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What's a contact type (form)

Contact types is the term we use for the various types of forms/documents that schools may use to record behaviour, whether that's positive, negative or neutral.

The Admin User can set up the various contact types (forms) through the Admin tab and teachers can then record behaviour on those forms through a widget in the -Dashboard area or through the -Welfare module.

Creating a contact type

1. Select the **>Admin** tab
2. Select **>Welfare>Contact Types** on the left-hand blue menu
3. Select **>New** at the bottom right-hand side of the page
4. Enter a name and a default connotation for the contact type/form that you are creating. The default connotation can be set to positive for good contacts and negative for bad, or can be left at neutral to allow teachers to set their own connotation.

New Contact type

Name:

Default Connotation:

What Happened:

What We Did:

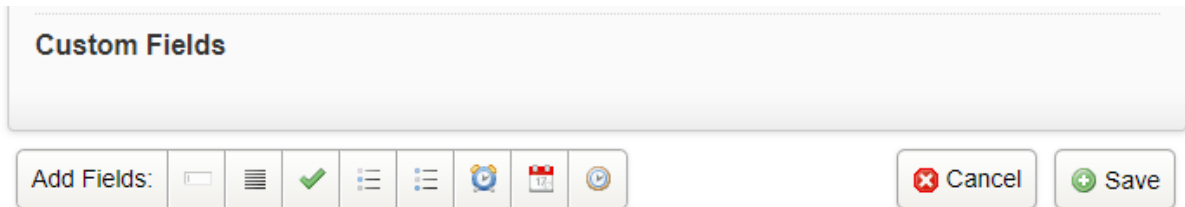
Custom Fields

Add Fields:

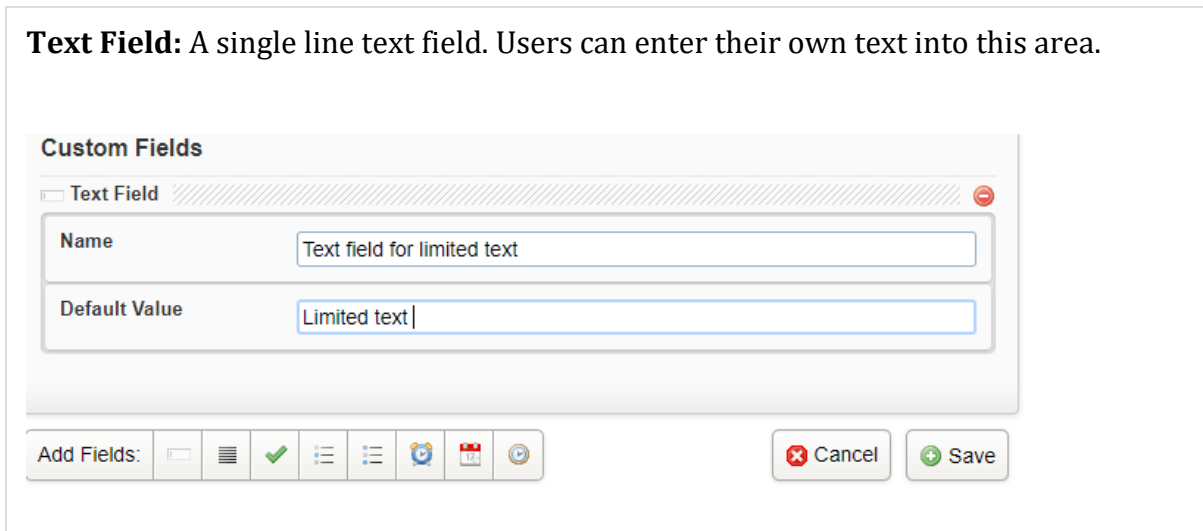
5. Add custom fields as required using the **>Add Fields** menu - located at the bottom left hand side of the screen with a number of icons. Hover over the icon to see what the icon does.
6. Once you insert a field you can customise it as required, and a live preview of the field will be displayed. To remove a field you no longer want, select the red button to the right of the field title.
7. When you have added all the required fields, select **>Save**

8. The contact type will be saved and be available for use immediately in the Welfare Module
9. You can shift the position of the fields by clicking into the field and holding down your mouse and shifting the field/section up or down

A breakdown of the custom fields available is as follows



Text Field: A single line text field. Users can enter their own text into this area.



Custom Fields

Text Field
-

Name

Default Value

Text Area
-

Name

Default Value

Add Fields:

✖ Cancel
+ Save

Text Area: A text area that can fit multiple lines. Users can enter their own text into this area.

Flag: A checkbox that can be ticked or un-ticked. Used for yes/no options.

Single Choice: A list of choices that allows for one selection out of many options. Can be displayed as a drop-down box or checkboxes. If the 'Optional' checkbox is not ticked, a selection must be made. You can click on the green 'plus' icon to add another choice, or on the red 'minus' icon to remove a specific choice.

Single Choice
-

Name

Choices

<input checked="" type="radio"/>	Swings	✓	-
<input type="radio"/>	See-saw	✓	-
<input type="radio"/>	Water cooler	✓	-

show as

Optional

Allow ad-hoc editing

Multiple Choice: A list of choices, many or no options can be selected. Can be displayed as a list or as checkboxes. You can click on the green 'plus' icon to add another choice, or on the red 'minus' icon to remove a specific choice.

Multiple Choices

Name: Use this where the teacher can select multiple options for e.g. behaviou

Choices:

- Shouting
- Punching
- Kicking
- Fighting

show as: List

Allow ad-hoc editing:

Date/Time: Allows the user to select a date and time using a calendar and time slider.

Date Field

Name: To record date and time of incident

Default Value:




Date: Allows the user to select a date using a calendar.

Time: Allows the user to select a time using a time slider.

Recording an incident on contact types (forms)

Once you've created the initial contact type (form), you can test using the contact type that you created.

Contact Types

Contact types					
Name	Created on	Applied	Fields	Position	Actions
<u>Playground Incidents</u>	14/01/2019	0	 5	14	 Edit  Delete

There are two ways that you can record incidents:

- On the **-Dashboard**, through the shortcut widget, “**New Contact**”
- Through the Welfare module tab

Recording an incident through the New Contact widget on the Dashboard

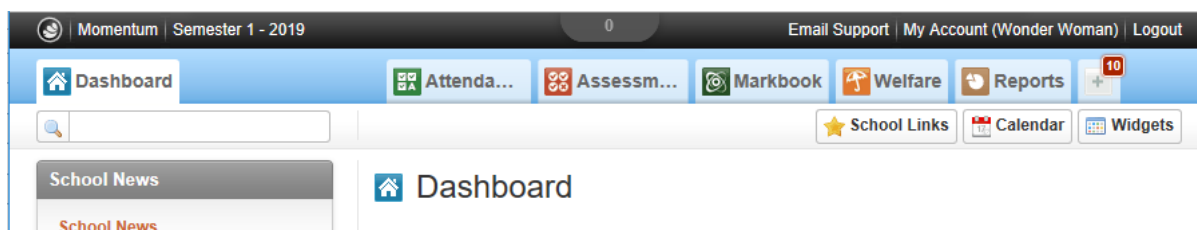
The -Dashboard area can be customised with widgets. The widgets are shot-cuts that either bring up information that you want to view or provide shortcuts for you to record data.

For the purpose of this exercise, you will be adding a shortcut for “New Contact”, through which you can quickly locate any student and record an incident against them.

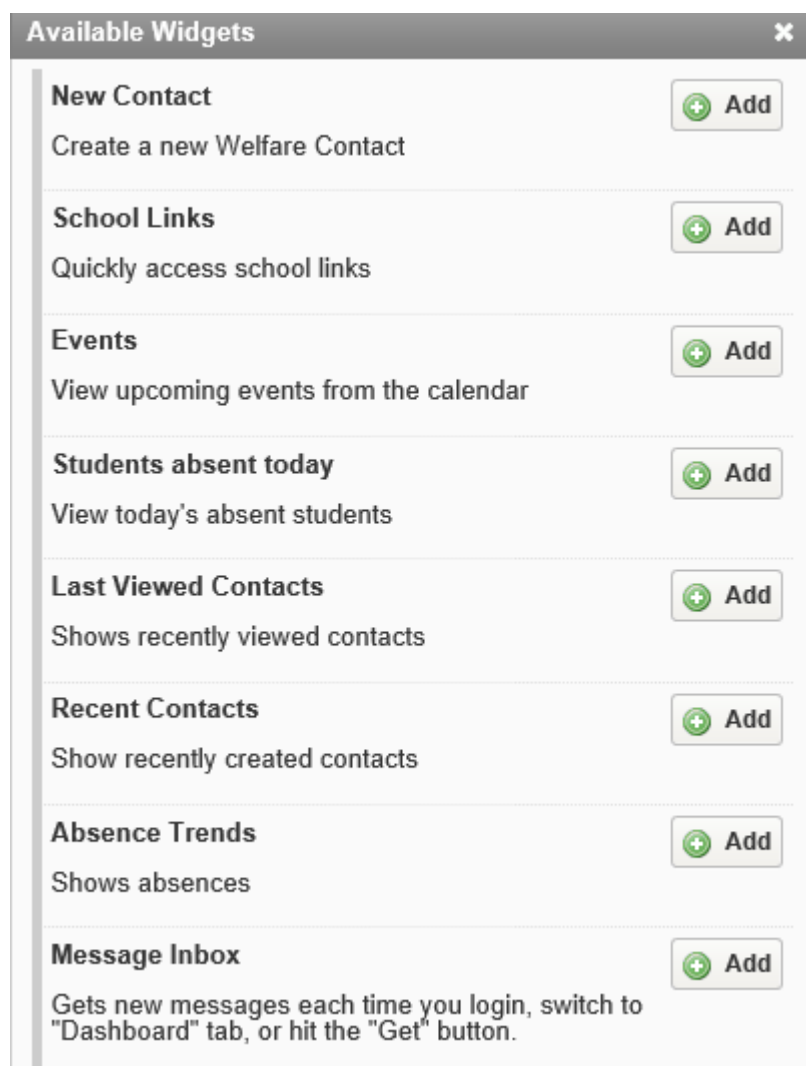
Adding a shortcut for Welfare to your Dashboard area

Every teacher can add or remove any of the available widgets onto their Dashboard area. The process for adding and removing widgets is very simple. Removal of a widget doesn't cause any loss of information. It's just like adding or removing a window to a room, it doesn't affect the contents of the room.

1. Select the -Dashboard tab
2. On the right-hand side, select >Widgets

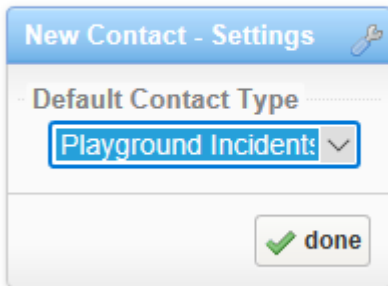


3. Look for “**New Contact**” and select the **>Add** icon located alongside it



4. You can now choose to have one of the contact types (forms) display as the first option or the default option. *Regardless of whether you select a default option, you will be able to select any contact type from the drop-down menu.*

Dashboard



5. Select **>done** to add the New Contact widget to your **-Dashboard** area

Now to record an incident through this widget, simply follow the steps in the section below:

Recording an incident through the widget on your Dashboard

You can now search for a student and record an incident against them. The same incident report can also be easily copied other students. This is useful where you have two or more students involved in the same incident, whether negative or positive.

1. In the search field **-Find Student**, search for the student by typing in three or more characters of their name for e.g. typing in Sam will bring you some auto match options of students with “Sam” in their name for e.g. Samantha; Samuel etc

Dashboard



2. Use your mouse to scroll down to the student that you’re looking for and select the student

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3. Select the contact type that you want to use for the selected student for e.g. Playground Incidents
4. Select **>Create**
5. Fill in the form. The form may have options to write down a description of what took place; as well as options for you to make a single or a multiple selection for e.g. you may have a section titled, “Types of behaviour” and the choices may be, “Shouting; Fighting; Kicking”. To make a multiple selection from the list simple hold down the “Control [Ctrl]” key on your keyboard and select all the options that apply to this student

New Contact for Jahnvi Wong

Contact Details

Connotation: ☀️ ☁️ 🌧️ 🌑 neutral Contact ID: N/A

Contact Date: 14/01/2019 12:00 AM Confidential?:

Type: Playground Incidents

Details

Text field for limited text: Use this where the teacher can select multiple options for e.g. behaviour type

Text field for larger amount of text:

Use this for where the teacher has to make a single choice for e.g. Location: Swings See-saw Water cooler

To record date and time of incident: 14/01/2019

Multiple selection dropdown: Shouting, Punching, Kicking, Fighting

What Happened

Type in what happened ...text text text

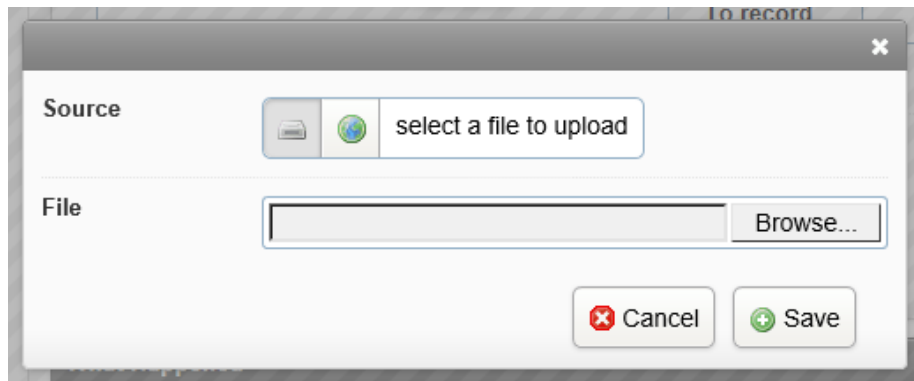
What We Did

Type in what the teacher did in response to the incident

Photos & Attachments

Photos & Attachments

6. Under the section **-Photos & Attachments** you can choose to upload photos/pdfs/scans/Word/Excel documents for e.g. if it was a graffiti incident, you could take a photo of the graffiti and then upload it. To add a photo or an attachment, select the **>Add** icon



7. Select **>Browse** to locate the photo or file on your computer and then select **>Save**




8. The photo or file will now appear in the section **-Photos & Attachments**
9. To remove the photo or the file, just use your mouse to hover over the photo or file, and a small red minus icon will appear on the top right of the image, select the red minus symbol icon and it will delete the uploaded file
10. Once you've finished filling out the form, select **>Save** in the bottom right-hand side of the screen
11. Once saved, the contact will be given a unique number. There is no need to make a note of the number.
12. Once a contact type is saved, you have the following options available to you
- **Print:** to print the contact type (form) that you just saved
 - **Email:** only users with Admin Level access can email other teachers from within Welfare to notify them of a contact type (form) created for a student.

Teachers will receive an email with the link to the contact type (form).

- **Generate Formletter**

This allows you to send a form letter to the contacts listed for the student. The form letter can be set up to populate with whatever information you want from the contact type (form) for e.g. type of incident; location etc. You can have a variety of form letters.

 **Generate formletter for 382133 - Bryan Tan** 

Please select the formletter to generate

Demo Letter 2 - Short Suspension

Demo Letter 1 - Long Suspension

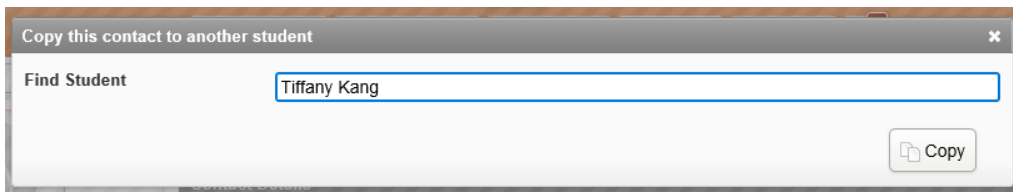
Referral letter

- **Edit**

Once saved, you can select the >Edit icon to make any changes to the contact type. The contact types can be edited at any time to make amendment.

- **Copy**

Once a contact type is created, it can be copied into another student easily. Select >Copy and then search for the students that you want to copy the same contact type to and select >Copy



The contact type will then be copied to those students. You can then select >Edit in the contact type to add or remove any information

The screenshot shows the Momentum system interface for Semester 1 - 2019. The top navigation bar includes 'Dashboard', 'Attendance', 'Assessment', 'Markbook', 'Welfare', 'Reports', 'School Links', and 'Calendar'. The main content area displays 'Contact 382131 for Tiffany Kang' with the following details:

Contact Details			
Connotation	neutral	Contact ID	382131
Contact Date	14/01/2019 12:00 AM	Confidential?	No
Type	Playground Incidents	Teacher	Wonder Woman

Category Details			
Text field for limited text	Limited text	Use this where the teacher can select multiple options for e.g. behaviour type	Shouting, Kicking
Text field for larger amount of text		To record date and time of incident	2019-01-14
Use this for where the teacher has to make a single choice for e.g. Location	See-saw		

What Happened
Type in what happened ...text text text

What We Did
Type in what the teacher did in response to the incident


Formletters

Icon	Name	Last Update	Actions
No Formletter were found.			

At the bottom of the interface, there is a row of action buttons: Print, Email, Generate Formletter, Edit, Copy, and New.

- **New**

Select the **>New** icon to add a different contact type for the same student, basically to record a separate incident for the same student.

 **New contact for Samantha Wannigama**

Please choose a contact type

Inappropriate Behaviour Log
Student Awards
Medical/Accident Report
Duress Report (Alarm or Phone)
Serious Incident Report
Passport to Success
Green System
Parent Contact Form









Adding and Modifying Form Letters

Form letters are letters with dynamic fields that can be generated and sent home to parents. Common form letters include detention and suspension notifications, school trips, and student award notifications.

Create a new form letter

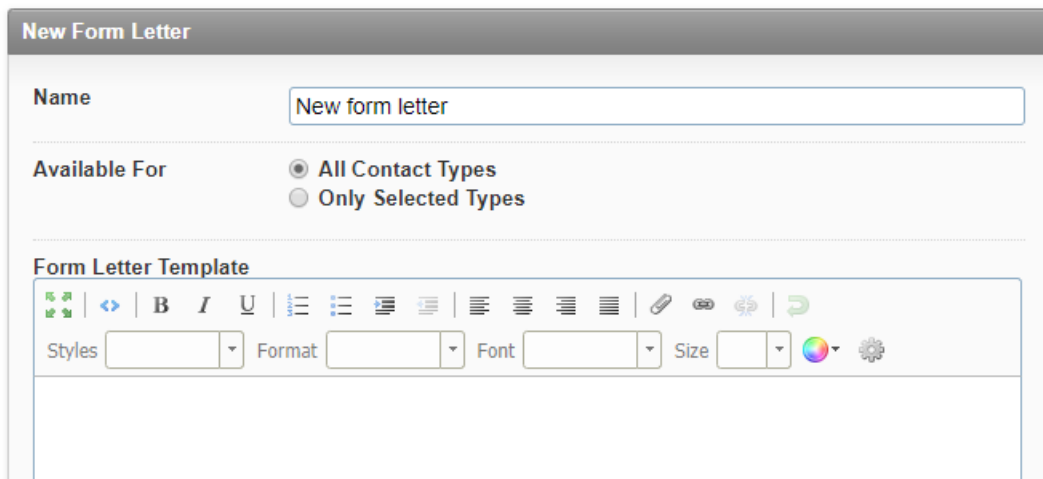
1. Select >**Admin**
2. Select >**Welfare** from the left-hand blue menu
3. Then select >**Form Letters**

Welfare Form Letter Templates

Welfare Form Letter Templates			
Name	Created on	Position	Actions
Referral letter	09/02/2016	20	 Edit  Delete
demo letter	20/02/2014	19	 Edit  Delete
Demo Letter 1 - Long Suspension	09/02/2012	18	 Edit  Delete
Demo Letter 2 - Short Suspension	09/02/2012	17	 Edit  Delete

4. Select >**New** icon on the main screen on the right

New Form Letter





New Form Letter

Name

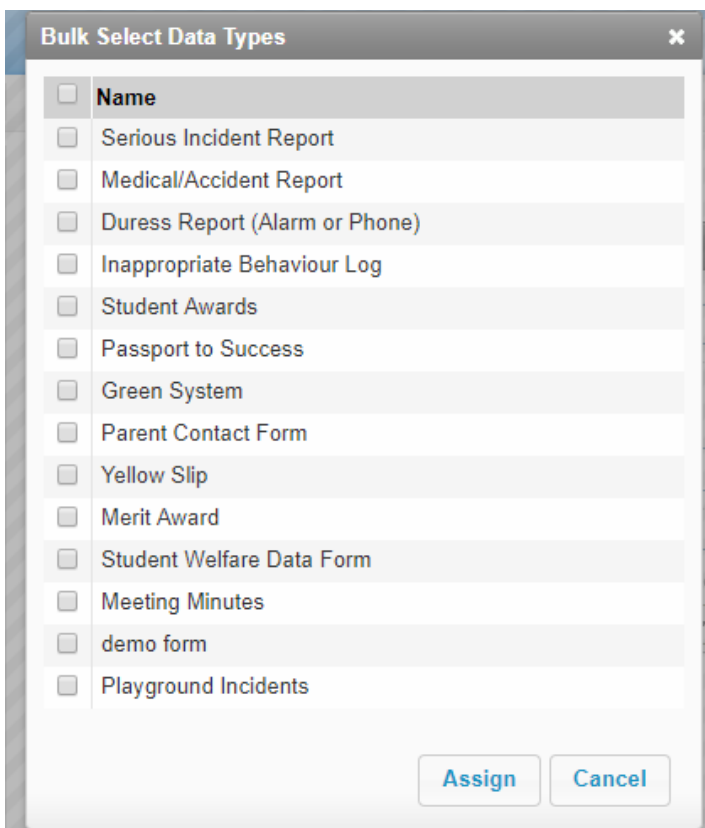
Available For All Contact Types
 Only Selected Types


Form Letter Template

Styles Format Font Size  

5. Enter a name for the Form Letter
6. Select which Contact Types you want the Form Letter to be available for e.g. if you only want an Awards Form Letter to be available when a student has an Awards Contact created, you can choose the **>Only Selected Types** option and type in the Student Awards contact type OR select multiple contact types you want to associate the letter with, by selecting **the >Bulk**

Assign link

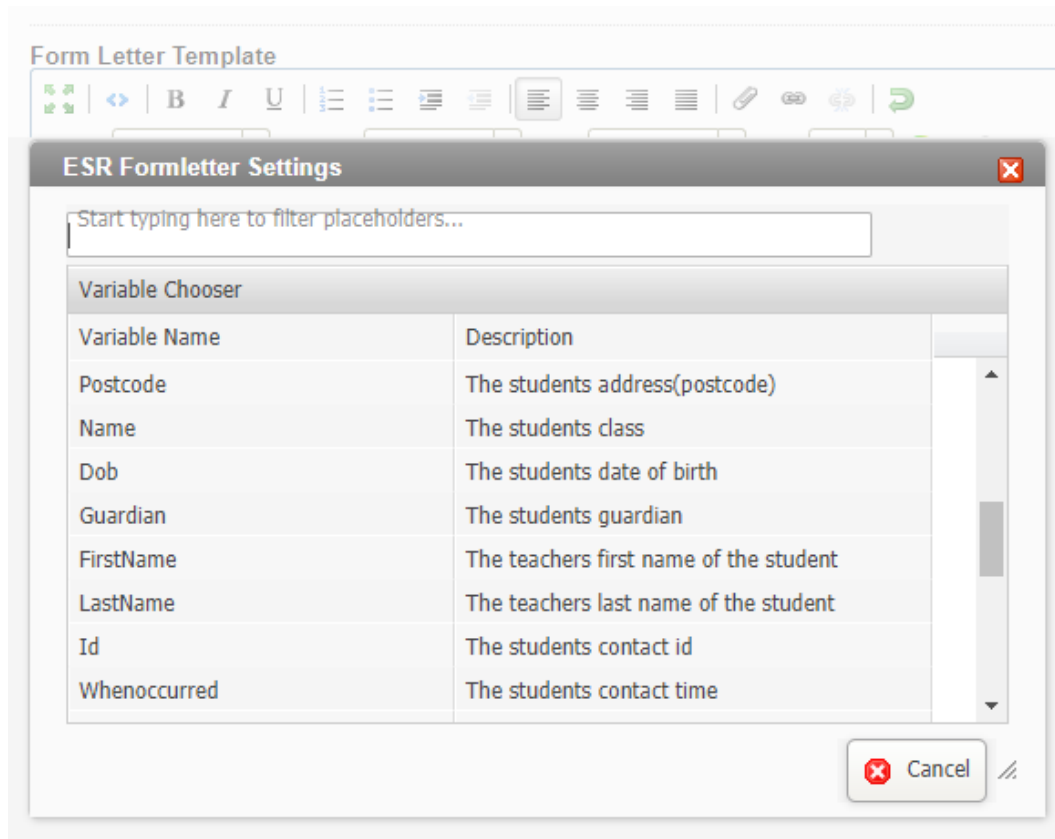


Bulk Select Data Types 

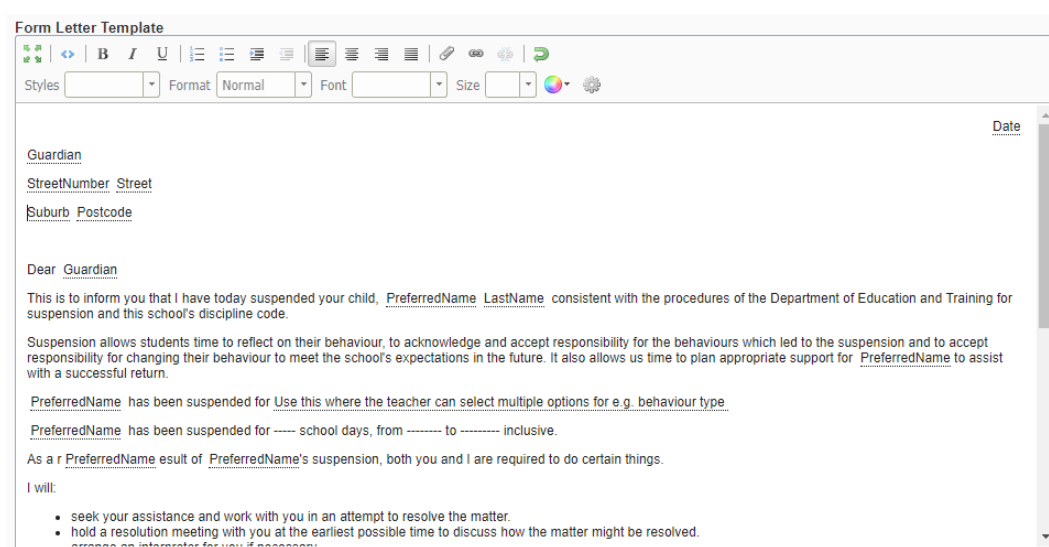
<input type="checkbox"/>	Name
<input type="checkbox"/>	Serious Incident Report
<input type="checkbox"/>	Medical/Accident Report
<input type="checkbox"/>	Duress Report (Alarm or Phone)
<input type="checkbox"/>	Inappropriate Behaviour Log
<input type="checkbox"/>	Student Awards
<input type="checkbox"/>	Passport to Success
<input type="checkbox"/>	Green System
<input type="checkbox"/>	Parent Contact Form
<input type="checkbox"/>	Yellow Slip
<input type="checkbox"/>	Merit Award
<input type="checkbox"/>	Student Welfare Data Form
<input type="checkbox"/>	Meeting Minutes
<input type="checkbox"/>	demo form
<input type="checkbox"/>	Playground Incidents

7. Type in your Form Letter using the default text editor.

8. Select the icon for **Placeholders** to dynamically insert information from the student's profile such as their guardian/parent name; home address. You can also select fields from your contact type (form) to populate the letter for e.g. description of the incident. The **Placeholder** menu is accessible by pressing the **blue <> button** in the text editor.



9. The letter will auto-populate the details of the student and any other placeholder information when generated.



10. Advanced users can edit the letter using the included HTML editor, available by clicking on the **-Cog Wheel** icon.

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11. You can add pictures, tables, and other formatting to your Form Letter to get it to look exactly as required. *If you could like to add the school letterhead to the form letters, please email us a jpeg file of the letterhead image or a Word document with the letterhead and we will upload that for you. Please send it to support@esr.com.au and let us know which form letter needs the letterhead placed on it.*
12. Select **>Save**
13. To modify an existing Form Letter, simply press the **'Edit'** button to the right of the Form Letter name

Welfare Form Letter Templates

Welfare Form Letter Templates			
Name	Created on	Position	Actions
New form letter	17/01/2019	21	 Edit  Delete
Referral letter	09/02/2016	20	 Edit  Delete

14. To delete a form letter, simply select the >Delete icon

Welfare Reports

Reports for Welfare can be generated from either the Welfare module or the Reports module.

What's the difference between reports from the Welfare module versus the Reports module?

The report filters that you can use in the Welfare module and the Reports module are very similar. The only difference is that the filters from the Reports module provides you with an overview of your results and a breakdown of the results, essentially a two-step process to get the reports that you want. If you don't need a summary of the incidents, then you can download your reports from within the Welfare module.

Welfare reports through the Reports module

You can generate reports for Welfare through the Reports tab as well as through the Welfare tab using the Advanced Filters menu option.

Firstly, we will look at generating reports through the Reports tab. You will be able to generate reports as a summary (number of incidents; type of incidents etc) and then drill into the summary by generating detailed reports for your chosen category/filter.

Welfare reports for specific current or past students

These steps help you generate Welfare reports for specific students, whether that's a single student or a disparate group of students. You can generate reports for both current and past (inactive) students.

1. Select the **-Reports** tab
2. On the left-hand brown menu, select **>Welfare**
3. To generate a report for a specific student, select **>By Student**

The screenshot shows the 'Welfare Reports - By Student' interface. The top navigation bar includes 'Dashboard', 'Attendance', 'Assessm...', 'Markbook', 'Welfare', 'Reports', 'Apps', and a notification icon with '10'. The left-hand menu has 'Attendance', 'Assessment', 'Markbook', 'Welfare' (selected), 'By Student', 'By Type', 'Custom Reports', and 'School Documents'. The main content area is titled 'Welfare Reports - By Student' and contains a 'Report Criteria' form with the following fields:

- Students:** Samantha Wannigama (5B)
- Date:** Custom
- Start Date:** 01/01/2019
- End Date:** 31/01/2019
- Include What Happened:**
- Include What We Did:**

A 'Generate' button is located at the bottom right of the form.

4. Type in the name of the student in the search field -Students
5. Select the date from the -Date field. If you need a report for a specific time period, select - Custom from the drop-down options in the -Date field, and specify the start and end date.
6. Select >Generate

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- You will get a spreadsheet with all the welfare incidents report for the student which you can open up in Excel

Contact ID	Student Code	Preferred Name	First Name	Last Name	Year	Class Name	Connotation	Contact Date	Confident	Type
382132	473223781	Samantha	Samantha	Wannigama	5	5B	neutral	16/01/2019 0:00	No	Playground Incidents

Welfare report by Contact Types (forms/records)

You can generate reports for all incidents recorded in a specific contact type (form for specific events/incidents) or in all contact types.

You can then choose to view a summary or a list of the records by the following filters:

- by Roll Class
- by Grade Years
- by Connotation (positive; negative; neutral)
- by the types of contact for e.g. Sick Bay; Negative Behaviour etc

- Select the **-Reports** tab
- On the left-hand brown menu, select **>Welfare**
- On the main page, you can then choose to generate a report for all contact types – this is the default selection. Or you can select the drop-down icon from the field **-Contact Type: All** and specify the Contact Type you want





Welfare Reports - Choose Type

Welfare Reports

Contact Type: All ▼

[List contacts by Roll Class](#)
[List contacts by Grade Years](#)
[List contacts by Connotation](#)
[List contacts by Contact Type](#)

- Then specify whether you want the Report overview (list) for one of the following filters:
 - by Roll Class
 - by Grade Years
 - by Connotation (positive; negative; neutral)
 - by the types of contact for e.g. Sick Bay; Negative Behaviour etc
- This will take you to the **-Report Options** screen. Here you can specify a date range by selecting **-Date** and selecting one of the options below; or selecting **-Specify Range** if you want the report for a specific period

 Roll Class 

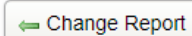
Report Options

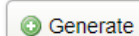
Range

Dates From To

Include What Happened

Include What We Did

 Change Report

 Generate

Roll Class Report

List contacts by Roll Class


Roll Classes	positive	neutral	negative	undefined	Total
3B	-	1	-	-	1
5B	-	1	-	-	1
1PD	-	2	-	-	2

 CSV

6. The summary of the reports will then be presented in the section below the -Report Options screen

Roll Classes(14/01/2019 - 19/01/2019)	positive	neutral	negative	undefined	Total
3B	0	1	0	0	1
5B	0	1	0	0	1
1PD	0	2	0	0	2

7. To view the details of the Report, select the hyperlinks in the first column for e.g. the Roll Class name; Year Level or name of Contact Type

 Roll Class 

Report Options

Range Specify Range ▾

Dates From To

Include What Happened

Include What We Did

← Change Report
+ Generate

Roll Class Report

List contacts by Roll Class ▾

Roll Classes	positive	neutral	negative	undefined	Total
3B	-	1	-	-	1
5B	-	1	-	-	1
1PD	-	2	-	-	2

+ CSV

8. This will then give you details such as Contact ID, Contact Date, Name of Student, Contact Type, Teacher reporting the incident etc
9. You can choose to export this report by selecting the icon with **CSV** on the bottom righthand corner of the screen
10. This will then generate a spreadsheet that you can open up in Excel

NOTE: You can also select the Contact ID numbers which are hyperlinks to the actual reported Contact Type. Selecting the Contact ID will take you to the specific student's profile in Welfare