# Wellbeing Admin Guide

January 2024

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# Introduction

The Wellbeing module is where you set up Sentral to track student progress and behaviour to improve visibility and management of their wellbeing.

Our Sentral YouTube channel has a Wellbeing Setup playlist that is referenced throughout this Admin Guide.

# Get started

## Confirm

Check the version of Sentral that your school uses. This helps you understand the options available for selection.

For more details, see Sentral versions.

## Consult

Consider your school’s policies and processes for managing student wellbeing before you start setting up Wellbeing. This helps you make decisions during the setup process, such as what customisations to make.

## Decide what

Does your school leadership team want to use incidents and follow-up actions to manage wellbeing? Be guided by the answer to this question when making configuration choices.

Configuring inbuilt lists is something that you must do. For example, you might decide that you're not going to do Detentions in Sentral and not ever use that section. However, if you don't have your inbuilt lists set up, then you're missing your staff list, your locations, your executives, etc.

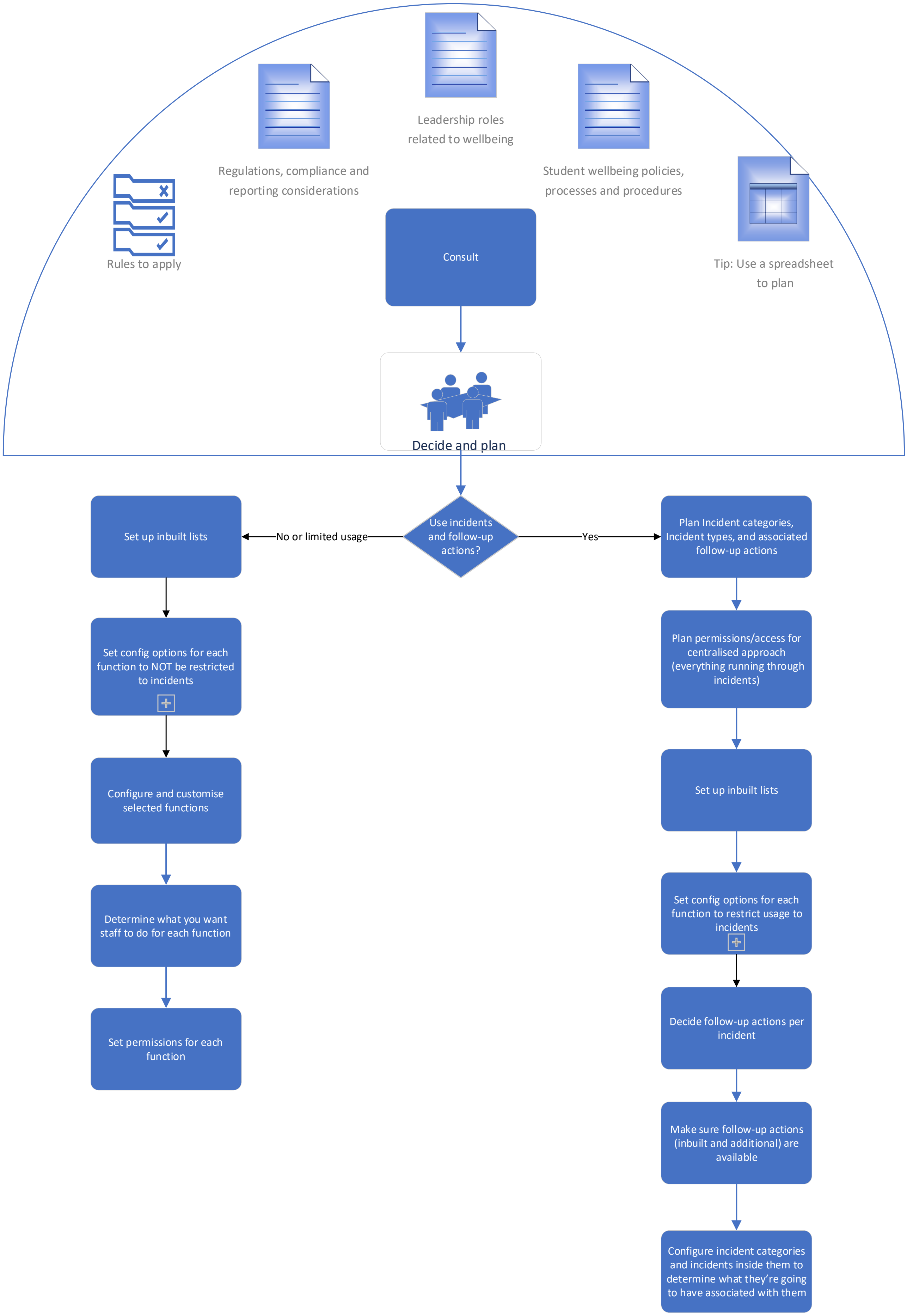
## Decide who

Identify and map the school staff leadership roles as they relate to student wellbeing. This is a key input to the system and underpins duty of care responsibilities. This information enables parents and school staff to actively monitor the wellbeing and development of students.  Teachers, Counsellors, Year Advisors, Stage Coordinator and Executive members all have varying parts to play in commending right behaviour and correcting poor behaviour.

## Decide when

Decide when to implement the Wellbeing module. Apart from populating the initial lists of categories and types, you can implement at any stage, provided you complete some basic parameters.

# Workflow ideas



# Key concepts

Sentral Wellbeing uses a case management approach to managing student wellbeing.

## Inbuilt lists

Inbuilt lists are used on all incidents to describe the overall details. The details are shared between all students and the incident.

## Categories

Categories contain one or more incident type and define the follow up actions that can be applied to an incident. There are several built-in categories that you can't remove, but you can hide them if your school doesn't require them.

For more details, see Categories and incident types in the Glossary section.

## Incident types

Incident types set the list of details that are associated with each incident.

You can:

- edit existing incident types
- add new incident types
- attach a sub type detail to an incident type.

For more details, see Categories and incident types in the Glossary section.

## Detentions, Referrals, Suspensions and Awards

These are all follow-up actions you can apply to an incident. You can hide the follow-up actions within each area from the Wellbeing menu if they don't apply to your school.

## Levels

Levels are a mechanism for recording the ongoing behaviour status of your students using a series of defined, positive and/or negative progressions. Students' incident records contribute to their overall levels of wellbeing and achievement.

You can:

- place students on a level manually
- elevate or demote students to a specific level because of an incident
- set levels to expire after a set time period
- set an entire class to a level
- use levels as follow-up actions.

You can switch off the Levels if your school has no use for this function.

# Configure Wellbeing

## Product versions

Your school will have one of the products listed in the Feature availability table below – with the main difference being the Classic versus Indigo user interface. There is a common feature set for all versions of the Wellbeing module.

**Feature availability**

| | Sentral Cloud (ST) | Sentral Enterprise (MT) |
|---|---|---|
| Wellbeing module | ■ | ■ |

## Permissions

There are two main scenarios:

- Your school is new to Sentral
- Your school already uses Sentral, and existing access levels are in place.

### New Sentral customer

Use your Global Admin account to apply Wellbeing Admin permissions to selected staff. If required, configure the access levels further to control the actions they can perform in the module.

For details, refer to the following guides in the Help Centre:

- Admin Guide – Induction for New School
- Admin Guide – Setup
- Admin Guide – Getting Started with Sentral.

### Existing Sentral customer

Check the configuration already in place. It may not be out-of-the-box.

For details, refer to the following guides in the Help Centre:

- Admin Guide – Induction for New School
- Admin Guide – Setup
- Admin Guide – Getting Started with Sentral.

## Access

To access Wellbeing from the Sentral home screen:

- Select the menu icon ( ) and choose Wellbeing.
- Select Setup and choose Wellbeing Setup.

# Home screen

Use the instructions in this section to configure the global information and reports that you want displayed on the home screen of the Wellbeing module.

Watch this video on our YouTube channel for an introduction to the Wellbeing home screen.
Wellbeing setup - Configuring the home screen

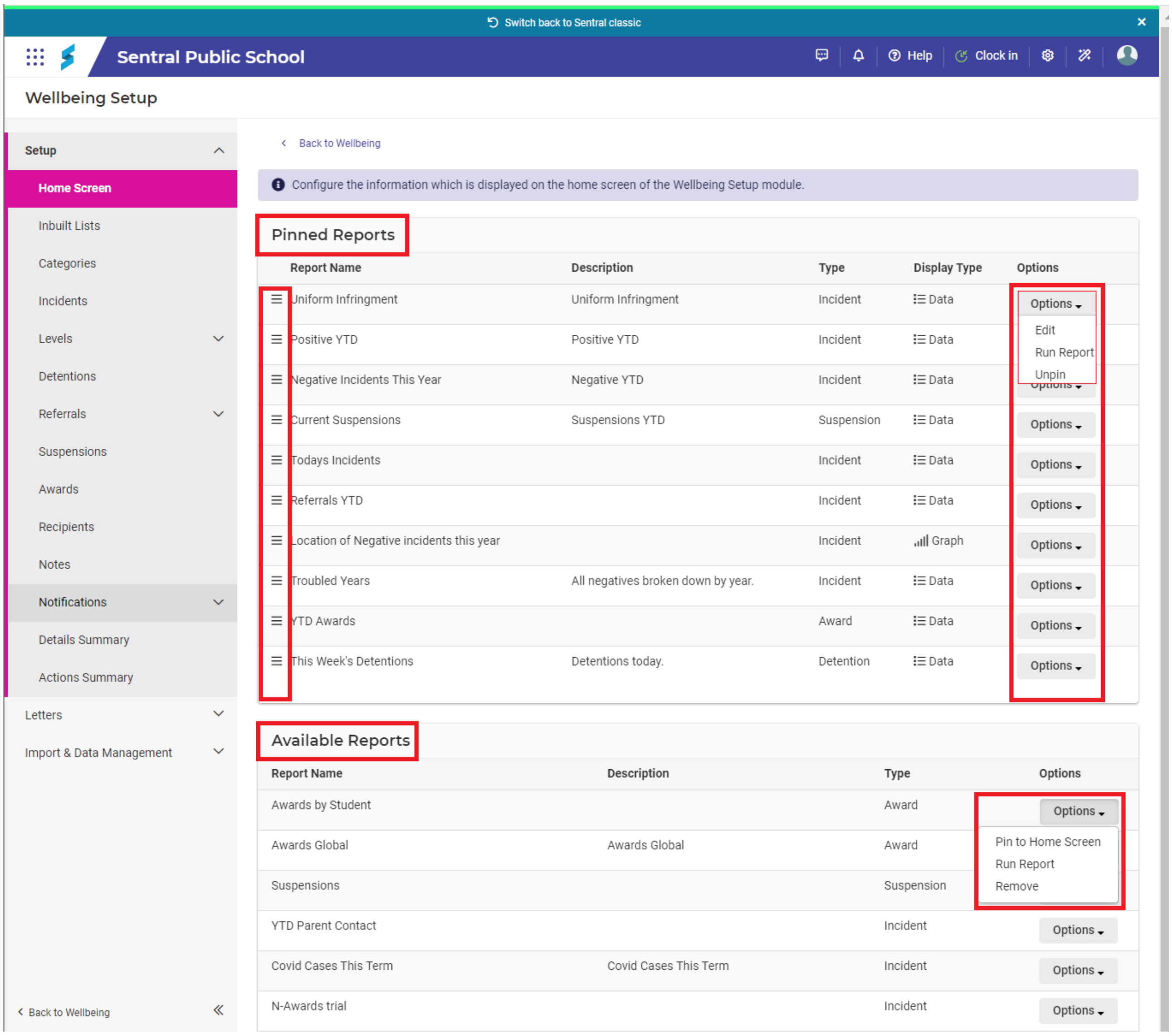



**Figure 1: Home screen setup example**

## To configure the home screen:

Use these steps to configure the information that displays on the Wellbeing home screen

1. Do one of the following:
   a. In the Wellbeing Setup section, select Home Screen.
   b. If Wellbeing Setup is already open, select Home Screen in the left menu.
2. Under Pinned Reports, do the following:
   a. To unpin a report from the Wellbeing home screen, select Options next to a report name and choose Remove. The report is moved to the Available Reports section.

    b. To edit the display options for the report, select Options next to a report name and choose Edit.
        i. In Edit a Report, enter a report name and description.
        ii. Limit the number of rows that display on the Wellbeing home screen
        iii. Select whether to only display the number of reports.
        iv. Select Save.
3. Under Available Reports, do the following:
    a. To pin a report to the Wellbeing home screen, select Options next to a report name and choose Pin to Home Screen. The report is moved to the bottom of the Pinned Reports section.
    b. To remove a report altogether, select Options next to a report name and choose Remove. Select OK to confirm.

### To reorder reports:

- Use the Drag handle icon ( ☰ ) to reorder items within the list. This changes the display order on the Wellbeing home screen.

## Configure inbuilt lists

The information you configure here is used on all incidents and shared between all students in the incident. Use it to customise lists for Periods, Executive types, Teachers, Locations, Faculties, Subjects and Extended Resolutions.

> If your school is new to Sentral, you'll need to add information. Watch this video to learn how to set up inbuilt lists. Wellbeing setup – Inbuilt lists

### To configure Periods:

1. Do one of the following:
    a. In the Wellbeing Setup section, select Inbuilt Lists.
    b. If Wellbeing Setup is already open, select Inbuilt Lists in the left menu.
2. Select Periods.
3. Use the Add, Edit or Remove buttons to define incident time periods for your school.

### To configure Executive types:

1. Do one of the following:
    a. In the Wellbeing Setup section, select Inbuilt Lists.
    b. If Wellbeing Setup is already open, select Inbuilt Lists in the left menu.
2. Select Executive Types.
3. Choose a name display option and select Save.
4. Use the Add, Edit and Remove buttons to assign people to roles.

    > You can edit the Deputy Principal or Year Advisor roles, but you can't remove them. They are included by default.

5. To create a role, enter a title for the new executive type and select Add.
6. To remove a role, select Remove next to the role.
7. To edit the person assigned to the Executive Type role, click Edit next to the role.
    a. Select Add Executive.
    b. Use Search to choose a person for the role.
    c. Select school years applicable for the role.
    d. Select Save.

## To configure Teachers:

You have three options to configure Teachers:

- Syncing with the Sentral data layer. See the Data Sources/Data Synchronisation section of the Sentral Setup Guide.
- Importing from the list of teachers in the Sentral data layer
- Adding teachers manually.

### To sync teachers with the Sentral data layer:

1. Do one of the following:
   a. In the Wellbeing Setup section, select Inbuilt Lists.
   b. If Wellbeing Setup is already open, select Inbuilt Lists in the left menu.
2. Select Teachers.
3. Under Options:
   a. Choose Yes next to Automatically Sync with Data Layer.
   b. Choose how you want names to be displayed.
   c. Choose Yes or No next to Add Teachers from Incidents.
   This adds the option to manually add teacher details during incident creation.
4. Select Save.

### To import teachers from the data layer:

1. Do one of the following:
   a. In the Wellbeing Setup section, select Inbuilt Lists.
   b. If Wellbeing Setup is already open, select Inbuilt Lists in the left menu.
2. Select Teachers.
3. Under Options:
   a. Choose No next to Automatically Sync with Data Layer.
   b. Choose how you want names to be displayed.
   c. Choose Yes or No next to Add Teachers from Incidents.
   This adds the option to manually add teacher details during incident creation.
4. Select Save.

### To add teachers manually:

***Warning:*** *You should only add teachers manually if you cannot import them from the data layer. Attempting to add new stuff who have simply not been imported yet will create duplicates.*

1. Do one of the following:
   a. In the Wellbeing Setup section, select Inbuilt Lists.
   b. If Wellbeing Setup is already open, select Inbuilt Lists in the left menu.
2. Select Teachers.
3. Under Options:
   a. Choose No next to the Automatically Sync with Data Layer.
   b. Choose how you want names to be displayed.
   c. Choose Yes or No next to Add Teachers from Incidents. This adds the option to manually add teacher details during incident creation.
4. Under Teachers:
   a. Select Add Teacher.
   b. Use Search to choose a person.
5. Select Save.

### To configure Locations:

1. Do one of the following:
   a. In the Wellbeing Setup section, select Inbuilt Lists.
   b. If Wellbeing Setup is already open, select Inbuilt Lists in the left menu.
2. Select Locations.
3. Use the Add, Edit and Remove buttons to customise locations for your school.

### To configure Faculties and Subjects:

1. Do one of the following:
   a. In the Wellbeing Setup section, select Inbuilt Lists.
   b. If Wellbeing Setup is already open, select Inbuilt Lists in the left menu.
2. Select Faculties and Subjects.
3. Use the Add, Edit and Remove buttons to customise Faculties and Subjects for your school.
4. To add a faculty, enter the faculty name and select Add.
   a. Under Edit Faculty, use search to choose a head teacher.
   b. Select Save.
5. To reorder the list of faculties, use the drag handle icon ( ≡ ).
6. To add a subject to a faculty, under Subjects, enter the subject name and select Add.
7. To edit a Faculty and related Subjects, select Edit next to the faculty name.
   a. Under Edit Faculty, edit details, and then select Save.
   b. Under Subjects, do one of the following:
      i. Select Edit, update the subject name, and then select Save.
      ii. Select Remove next to a subject, and then select OK to confirm.
8. To reorder the list of subjects, use the drag handle icon ( ≡ ).

### To configure Extended Resolutions:

1. Do one of the following:
   a. In the Wellbeing Setup section, select Inbuilt Lists.
   b. If Wellbeing Setup is already open, select Inbuilt Lists in the left menu.
2. Select Extended Resolutions.
3. Use the Add, Edit and Remove buttons to customise both Completed Resolutions and Further Action Required Resolutions for your school.
4. To add a resolution, enter the new resolution name and select Add.
5. To edit a resolution, select Edit next to the resolution name. Edit details and select Save.
6. To remove a resolution, select Remove next to the resolution name, and then select OK to confirm.

## Configure categories

The information you configure for categories helps define incident types and the follow up actions that can be applied to an incident.

> If your school is new to Sentral, you'll need to add information. Watch this video on our YouTube channel to learn how to set up categories. Wellbeing setup – Categories

### To add a category:

1. Do one of the following:
   a. In the Wellbeing Setup section, select Categories.
   b. If Wellbeing Setup is already open, select Categories in the left menu.

2. Select New Category.
3. Enter the name of the category, and then select Add.
4. In Category Details, update settings to suit your school's requirements.
5. Select Save.

## To remove a category:

1. Do one of the following:
    a. In the Wellbeing Setup section, select Categories.
    b. If Wellbeing Setup is already open, select Categories in the left menu.
2. Select Remove next to a category, and then select OK to confirm.

    This removes the category completely.

    You can't remove categories that have Disable next to them due to system restrictions. However, you can hide these categories if they're not relevant for your school.

## To hide a category:

1. Do one of the following:
    a. In the Wellbeing Setup section, select Categories.
    b. If Wellbeing Setup is already open, select Categories in the left menu.
2. Do one of the following:
    a. Select Disable next to a category, and then select OK.
    b. Select Edit next to a category, and then select Hide on the Category Details screen.

    Both methods move the category to the Hidden Categories section.

    You can't remove categories that have Disable next to them due to system restrictions.

## To restore a hidden category:

1. Do one of the following:
    a. In the Wellbeing Setup section, select Categories.
    b. If Wellbeing Setup is already open, select Categories in the left menu.
2. Under Hidden Categories, select Show next to a category to restore it.
3. To reorder the list of categories, use the drag handle icon ( ≡ ).

## To edit a category:

1. Do one of the following:
    a. In the Wellbeing Setup section, select Categories.
    b. If Wellbeing Setup is already open, select Categories in the left menu.
2. Select Edit next to an existing category.
3. In Category Details, update settings to suit your school's requirements.
4. Select Save.

## To add an incident type to a category:

1. Do one of the following:
    a. In the Wellbeing Setup section, select Categories.
    b. If Wellbeing Setup is already open, select Categories in the left menu.
2. Select Edit next to a category.
3. In Category Details, under Incident Types, select New Type.
4. Enter a name for the incident type and select Add.
5. In Incident Type Details, update settings to suit your school's requirements.

## To remove an incident type from a category:

1. Do one of the following:
    a. In the Wellbeing Setup section, select Categories.

    b. If Wellbeing Setup is already open, select Categories in the left menu.
2. Select Edit next to a category, and then under Incident Type Details, select Remove. Select OK to confirm.

### To add incident details to an incident type:

1. Do one of the following:
    a. In the Wellbeing Setup section, select Categories.
    b. If Wellbeing Setup is already open, select Categories in the left menu.
2. Select Edit next to a category.
3. Under Incident Types, select Edit next to an incident type.
4. Under Incident Details:
    a. Select Add Incident Detail.
    b. Update settings to suit your school's requirements.
    If you added a new detail from the Details Summary screen, it displays in the Detail dropdown list.
    c. Select Add.

### To configure incident details for an incident type:

1. Do one of the following:
    a. In the Wellbeing Setup section, select Categories.
    b. If Wellbeing Setup is already open, select Categories in the left menu.
2. Select Edit next to a category.
3. Under Incident Types, select Edit next to an incident type.
4. Under Incident Details, select Options, and then choose Configure Incident Detail from the menu.
5. In Configure Incident Detail, update settings to suit your school's requirements.
6. Select Save.

### To attach a sub type detail to an incident type:

1. Do one of the following:
    a. In the Wellbeing Setup section, select Categories.
    b. If Wellbeing Setup is already open, select Categories in the left menu.
2. Select Edit next to a category.
3. Under Incident Types, select Edit next to an incident type.
4. Under Incident Type Details:
    a. Choose an option from the Sub Type Detail list. Whatever you choose here displays on registers and reports.
    b. Select Save.

## Configure incident options

The information you configure for Incident Options applies to all incidents. Use these settings to customise what displays on the Incident Creation screen.

***Note:*** *The changes you make here can also affect the Incident Reports screen.*

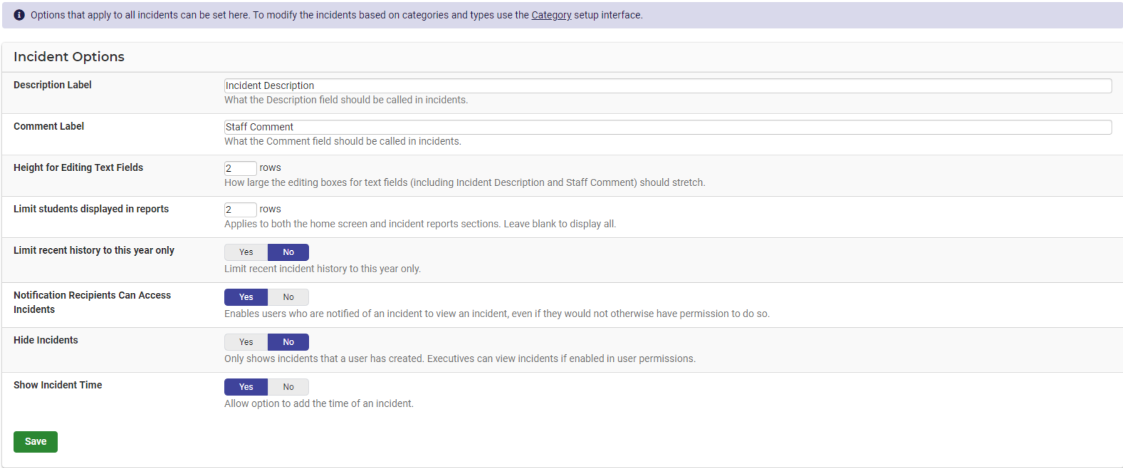



**Figure 2: Incident Options screen example**

Watch this video on our YouTube channel to learn how to set up incidents. Wellbeing setup - Incidents

### To edit Incident options:

1. Do one of the following:
   a. In the Wellbeing Setup section, select Incidents.
   b. If Wellbeing Setup is already open, select Incidents in the left menu.
2. Update settings suit your school's requirements.
3. Select Save.

## Configure follow-up actions

Categories include an option for you to add follow-up actions that trigger another function within Wellbeing such as Notifications, Detentions, Levels or Suspensions.

Choosing Awards, Detentions, Levels or Suspensions as follow-up actions gives users the same options when they're entering details within the Incident that they get when entering an Award, Detention, Level or Suspension directly into the registers. When they save the incident, it also triggers the follow-up action – for example creates a suspension.

Follow-up actions that you create for your school are different to the Wellbeing module's inbuilt actions. Inbuilt actions trigger processes in Wellbeing such as creating an award or a detention. School created ones just record your selection within the student record.

### To add follow-up actions to a category:

1. Do one of the following:
   a. In the Wellbeing Setup section, select Categories.
   b. If Wellbeing Setup is already open, select Categories in the left menu.
2. Select Edit next to a Category.
3. Under Follow Up Actions, select Add Follow Up Action.
4. Do one of the following:
   a. Select an option from the Action List.
      i. Either leave the action name unchanged or enter an override name.

      If you chose an option linked to another function within Wellbeing, you can only modify the action in the Actions Summary. You're limited to overriding the Override Detail Name in the Configuration settings.

      ii. Select Save.

   b. Under Detail Options, enter a name, and then select Add. If you created your own follow-up action, you can add options to it.

### To edit an existing follow-up action:

1. In the Wellbeing Setup section, select Categories.
2. Select Edit next to a Category.
3. Under Follow Up Actions, next to the one you want to edit, select Options and then choose from the menu:
   a. Edit Action – to edit Action Details for the current category as well as other categories where it is used.
      i. Update settings to suit your school's requirements.
      ii. Select Save.
   b. Configure Follow Up Action – to set an override name and specify whether the setting is 'Always on'.
      i. Update settings to suit your school's requirements.
      ii. Select Save.
   c. Remove – to remove the action from the current category.
      i. Select OK to confirm.

## Configure levels

Levels are a mechanism for recording the ongoing behaviour status of your students.

Watch this video on our YouTube channel to learn about considerations when deciding if and how to implement Levels at your school. Wellbeing Setup – Levels

### To configure levels options

Use the settings on this screen to customise the look and feel of the Levels function.

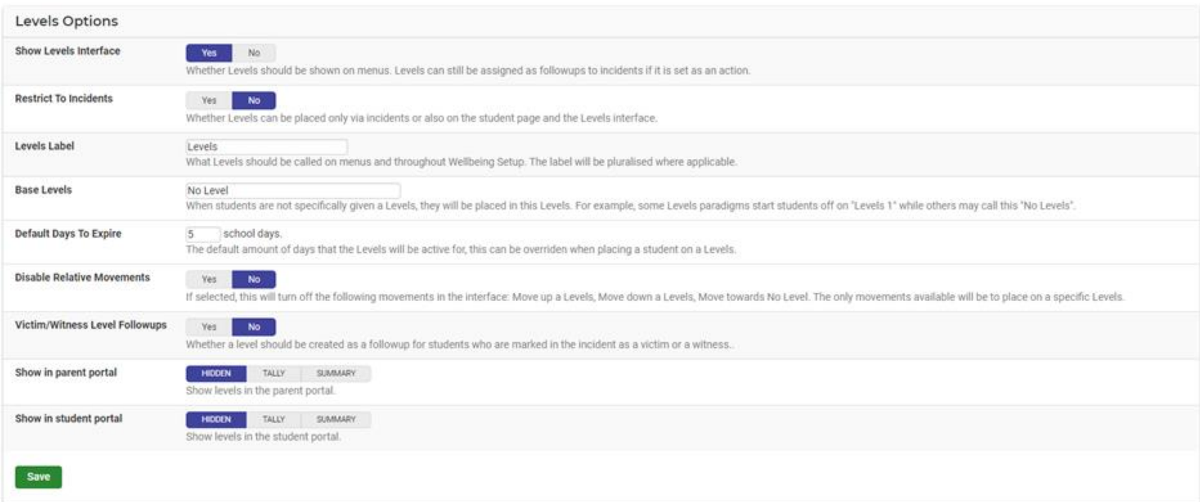
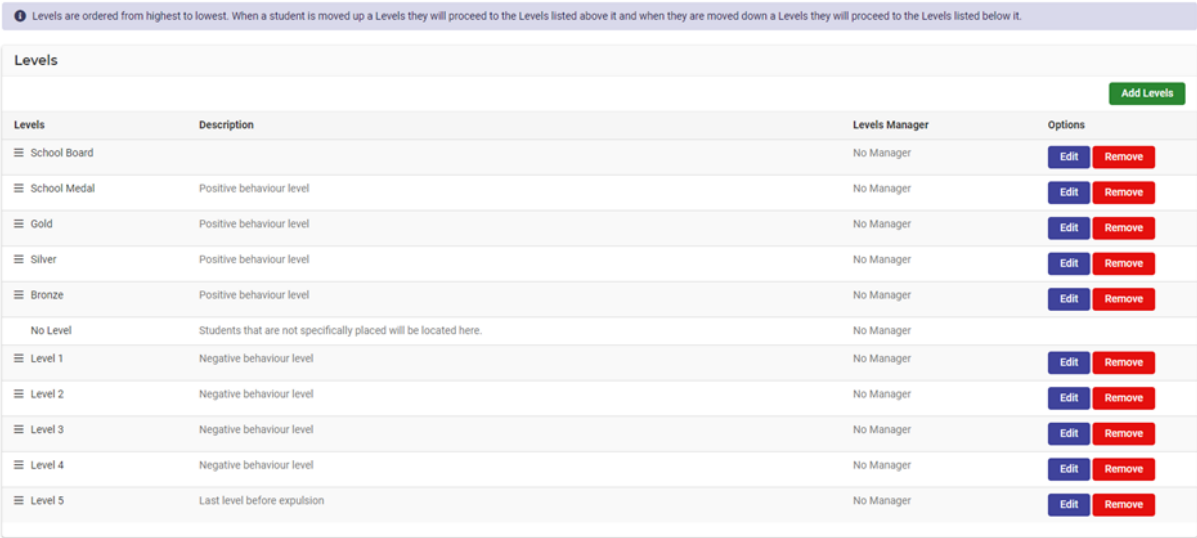



**Figure 3: Levels Options**

1. Do one of the following:
   a. In the Wellbeing Setup section, select Levels.
   b. If Wellbeing Setup is already open, select Levels in the left menu.
2. Select Levels Options.
3. Update settings to suit your school's requirements.
4. Select Save.

## To manage levels

Levels are ordered from highest to lowest. Use this section to define levels in a way that matches your school's philosophy on managing student wellbeing.


Levels are ordered from highest to lowest. When a student is moved up a Levels they will proceed to the Levels listed above it and when they are moved down a Levels they will proceed to the Levels listed below it.

Levels

Add Levels

| Levels | Description | Levels Manager | Options |
|---|---|---|---|
| School Board | | No Manager | Edit Remove |
| School Medal | Positive behaviour level | No Manager | Edit Remove |
| Gold | Positive behaviour level | No Manager | Edit Remove |
| Silver | Positive behaviour level | No Manager | Edit Remove |
| Bronze | Positive behaviour level | No Manager | Edit Remove |
| No Level | Students that are not specifically placed will be located here. | No Manager | |
| Level 1 | Negative behaviour level | No Manager | Edit Remove |
| Level 2 | Negative behaviour level | No Manager | Edit Remove |
| Level 3 | Negative behaviour level | No Manager | Edit Remove |
| Level 4 | Negative behaviour level | No Manager | Edit Remove |
| Level 5 | Last level before expulsion | No Manager | Edit Remove |

**Figure 4: Example of levels used - with base level set to 'No Level'**

### To add a level to the list:

1. Select Add Level.
2. Enter a name for the level.
3. (Optional) Enter a description for the level.
   This is a generic level description that you can use to organise levels in setup. The description that displays in the register is the one that users enter when putting a student on a level.
4. Choose a Levels Manager option.
5. Select Add.

### To re-order the levels:

- Use the Drag handle icon ( ☰ ) to reorder items within the list.

### To edit existing levels:

1. Do one of the following:
   a. In the Wellbeing Setup section, select Levels.
   b. If Wellbeing Setup is already open, select Levels in the left menu.
2. Select Manage Levels.
3. Select Edit next to a level.
4. In Edit Levels, update information to suit your school's requirements.
5. Select Save.

### To remove an existing level:

1. Do one of the following:
   a. In the Wellbeing Setup section, select Levels.
   b. If Wellbeing Setup is already open, select Levels in the left menu.
2. Select Manage Levels.
3. Select Remove next to a level.
4. Select OK to confirm.

## To configure expired placements

Use the settings on this screen to define how students' level placements are to be handled after the set number of days has expired.

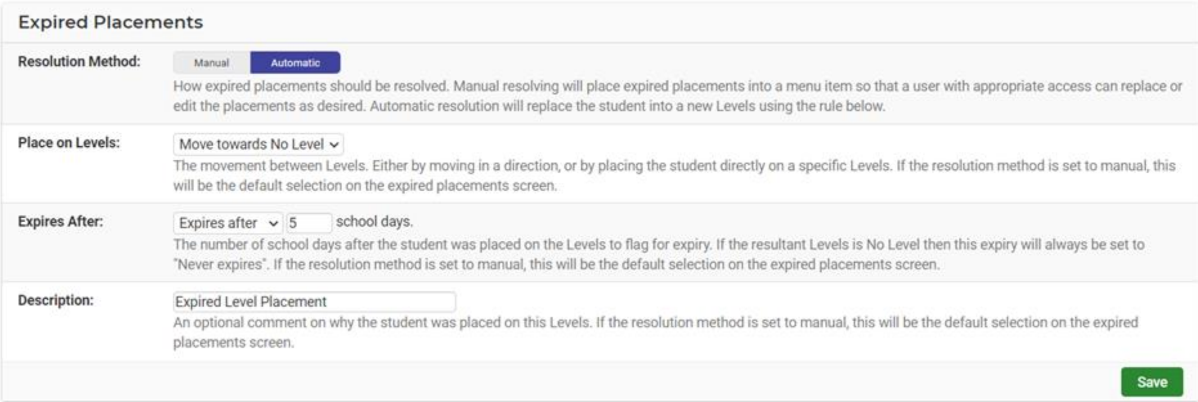



**Figure 5: Expired Placements screen**

1. Do one of the following:
   a. In the Wellbeing Setup section, select Levels.
   b. If Wellbeing Setup is already open, select Levels in the left menu.
2. Select Expired Placements.
3. Update settings to suit your school's requirements.
4. Select Save.

## To configure reset placements

Use the settings on this screen to reset a group of students to a certain level.

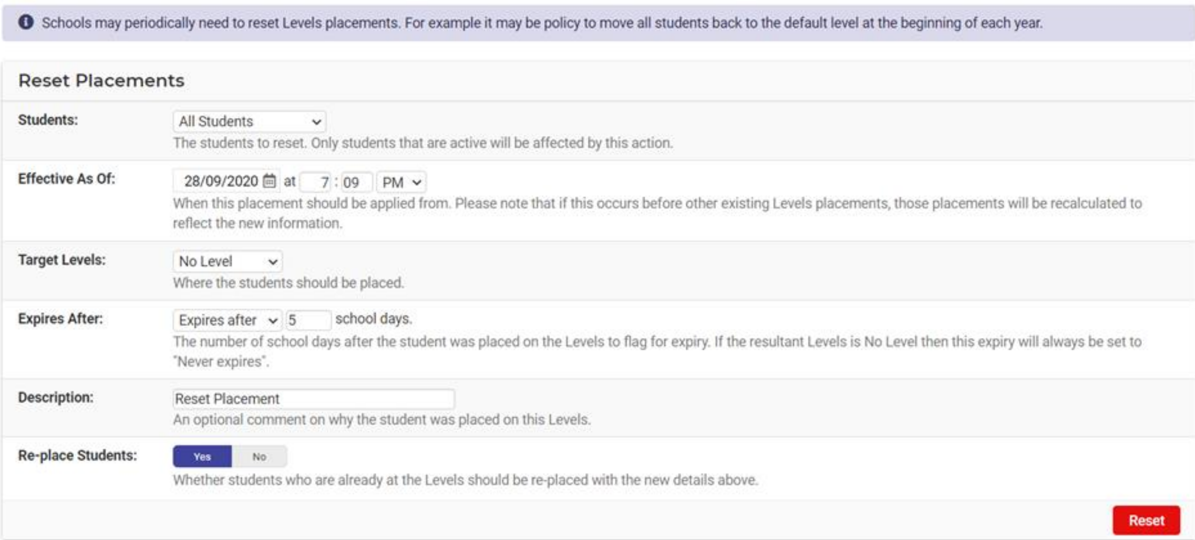



**Figure 6: Reset Placements screen**

1. Do one of the following:
   a. In the Wellbeing Setup section, select Levels.
   b. If Wellbeing Setup is already open, select Levels in the left menu.
2. Select Reset Placements.
3. Update settings to suit your school's requirements. For example, you might choose to reset all students to 'No Level' at the start of each school year.

4. Select Save.

## Configure detentions

There are two ways to ways to add detentions:

- Manually via Place in Detention
- As a follow-up action to an incident.

Use the settings in the three sections below to customise Detentions to suit your school's requirements.

- Detention Options – to specify if and how your school uses Detentions
- Detention Periods – to define when a detention can take place and group detention periods together
- Detention Statuses – to define the status for each detention to indicate if it has been completed or needs to be rescheduled.

Watch this video on our YouTube channel for an introduction to setting up the Detentions function.
Wellbeing setup - Detentions

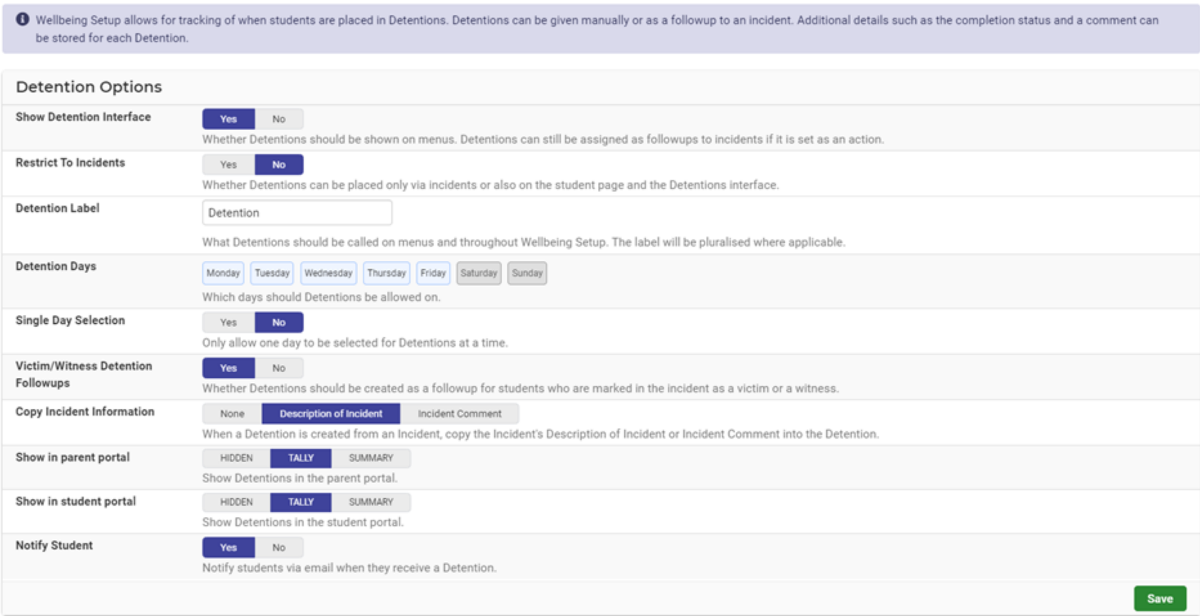



**Figure 7: Detention Options section of the Detentions screen**

### To configure detentions options:

1. Do one of the following:
    a. In the Wellbeing Setup section, select Detentions.
    b. If Wellbeing Setup is already open, select Detentions in the left menu.
2. Under Detention Options, update settings to suit your school's requirements.
3. Select Save.

### To add a new detention period:

1. Do one of the following:
    a. In the Wellbeing Setup section, select Detentions.
    b. If Wellbeing Setup is already open, select Detentions in the left menu.
2. Under Detention Periods, enter a name for the period and select Add.
3. Select Save.

## To reorder detention periods:

- Use the Drag handle icon ( ☰ ) to reorder items within the list.

## To edit existing detention periods:

1. Do one of the following:
   c. In the Wellbeing Setup section, select Detentions.
   d. If Wellbeing Setup is already open, select Detentions in the left menu.
2. Select Edit next to a detention period.
3. Under Detention Periods, update fields to suit your school's requirements:
   a. Name – to rename the period.
   b. Default Period – to turn default on or off.
   c. Group – to place the detention period within a group.
   d. Maximum students – to restrict student numbers for the detention period.
   e. Restrict days – to specify days for the detention period.
   f. Select a default option for the period.
4. Select Save.

## To remove existing detention periods:

1. Do one of the following:
   a. In the Wellbeing Setup section, select Detentions.
   b. If Wellbeing Setup is already open, select Detentions in the left menu.
2. Select Remove next to a period.
3. Select OK to confirm.

## To add a new detention status:

1. Do one of the following:
   a. In the Wellbeing Setup section, select Detentions
   b. If Wellbeing Setup is already open, select Detentions in the left menu.
2. Under Detention Statuses, enter a name for the status and select Add.

## To edit an existing detention status:

1. Do one of the following:
   a. In the Wellbeing Setup section, select Detentions
   b. If Wellbeing Setup is already open, select Detentions in the left menu.
2. Under Detention Statuses, select Edit next to a status.
3. In Edit Detentions Status, update fields to suit your school's requirements:
   a. Name – to rename the status
   b. Colour – to specify a colour for the text.
   c. Requires Reschedule – to specify if reschedule applies when a student doesn't turn up.
4. Select Save.

## To remove existing detention statuses:

1. Do one of the following:
   a. In the Wellbeing Setup section, select Detentions
   b. If Wellbeing Setup is already open, select Detentions in the left menu.
2. Under Detention Statuses, select Remove next to a status. There are some statuses that you can't remove because they are bult-in.
3. Select OK to confirm.

## Configure referrals

Referrals allows staff to refer students for additional support either through internal or external sources.

> Watch this video on our Youtube channel for an introduction to setting up the Referrals function.
> Wellbeing setup - Referrals

There are two ways to manage referrals:

- via the Referrals menu in Wellbeing
- creating a Referral incident. For details see Configure categories.

Use the settings in the three sections below to customise Referrals to suit your school's requirements:

- General
- Referral Types – see Referral types in the glossary section for an example
- Referral Reasons.

### To switch on referrals:

1. Do one of the following:
    a. In the Wellbeing Setup section, select Referrals.
    b. If Wellbeing Setup is already open, select Referrals in the left menu.
2. In the left menu, select General.
3. Under Referrals, select Yes to show the referrals interface.
4. Select Save.

### To add a new referral type:

1. Do one of the following:
    a. In the Wellbeing Setup section, select Referrals.
    b. If Wellbeing Setup is already open, select Referrals in the left menu.
2. In the left menu, select Referral Types.
3. Select Edit Subtypes next to a referral type.
4. In Edit Referral Type, enter a name for the referral type and select Add.
5. Select Save.

### To edit an existing referral type:

1. Do one of the following:
    a. In the Wellbeing Setup section, select Referrals.
    b. If Wellbeing Setup is already open, select Referrals in the left menu.
2. In the left menu, select Referral Types.
3. Select Edit Subtypes next to a referral type.
4. In Edit Referral Type, do one of the following:
    a. Edit the name of the referral type.
    b. Select X next to the referral type to remove it from the list.
5. Select Save.

### To add a new referral reason:

1. Do one of the following:
    a. In the Wellbeing Setup section, select Referrals.
    b. If Wellbeing Setup is already open, select Referrals in the left menu.
2. In the left menu, select Referral Reasons.
3. Enter a new referral reason and then select Add New Reason.

### To edit a referral reason:

1. Do one of the following:
   a. In the Wellbeing Setup section, select Referrals
   b. If Wellbeing Setup is already open, select Referrals in the left menu.
2. In the left menu, select Referral Reasons.
3. Select Edit next to a referral reason.
4. Update the reason name, and then select Save.

### To remove a referral reason:

1. Do one of the following:
   a. In the Wellbeing Setup section, select Referrals.
   b. If Wellbeing Setup is already open, select Referrals in the left menu.
2. In the left menu, select Referral Reasons.
3. Select Remove next to a referral reason.
   If the referral reason has sub reasons, you'll have to remove those first.
4. Select OK to confirm.

## Configure Suspensions

Suspensions are broken down into various categories and types. Some of these categories and types are built into Wellbeing and you can't modify them. Instead, you can add custom suspension types to built-in categories.

Watch this video on our Youtube channel for an introduction to setting up Suspensions. Wellbeing setup - Suspensions

### NSW Department of Education (NSW DoE)

If you are configuring suspensions for a NSW Department of Education (NSW DoE) school, you must comply with NSW DoE policy regarding suspensions.

There are three scenarios for settings:

- Hidden settings
  Where necessary, Sentral has configured settings to support compliance with the NSW DoE Behaviour and Suspension policy and these settings are hidden by default.
- Visible settings (configurable)
  There are some settings that you must configure to comply with DoE policy.
  For example, Allow New Suspension Categories and Allow New Suspension Types are visible, but should be set to No.
  There are also some settings that may differ between schools, depending on how your school uses Sentral. For example, Show in Parent Portal and Show in Student Portal settings.

### Other schools

The configuration is disabled by default but is available for all schools.

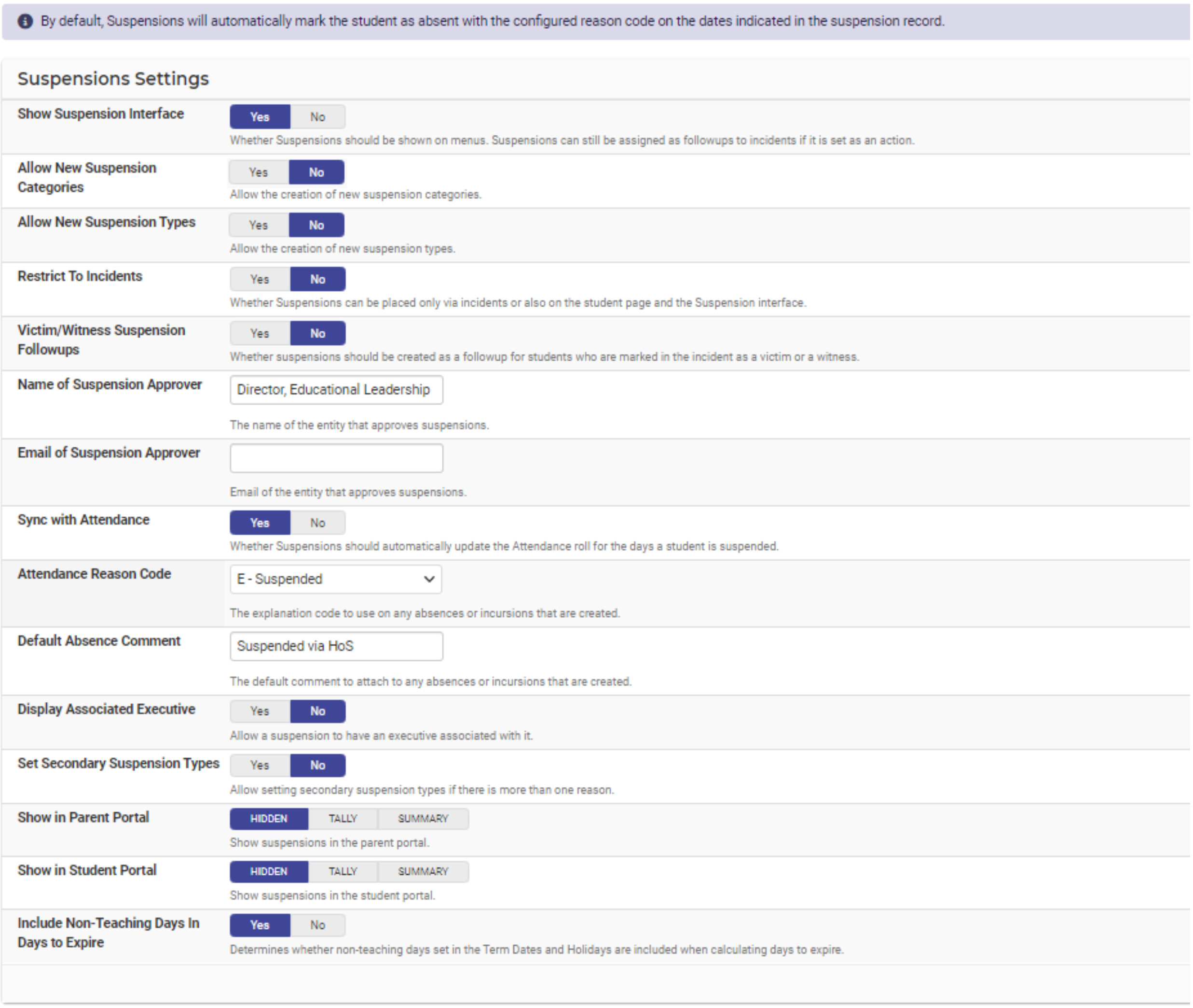



**Figure 8: Suspension settings – NSW DoE example**

There are two ways to add suspensions:

- manually via Place on Suspension
  This option doesn't create an incident number, which has implications for tracking incidents for students in the future.
- as a follow-up to an incident.

Two of the settings you choose affect other Sentral modules:

- By default, Suspensions automatically marks the student as absent with the configured reason code on the dates indicated in the suspension record.
- Allowing secondary suspension type makes a merge field available in the letter template.

Use the settings in the two sections below to customise Suspensions to suit your school's requirements:

- Suspensions Settings
- Suspension Categories.

## To switch on suspensions

1. Do one of the following:
    a. In the Wellbeing Setup section, select Suspensions.

    b. If Wellbeing Setup is already open, select Suspensions in the left menu.
2. Under Suspensions Settings, select Yes for Show Suspension Interface.
3. Select Save.

## To configure suspension settings:

1. Do one of the following:
    a. In the Wellbeing Setup section, select Suspensions.
    b. If Wellbeing Setup is already open, select Suspensions in the left menu.
2. Under Suspensions Settings, choose options to suit your school's requirements.
3. Select Save.

## To add a suspension category:

1. Do one of the following:
    a. In the Wellbeing Setup section, select Suspensions.
    b. If Wellbeing Setup is already open, select Suspensions in the left menu.
2. Under Suspension Categories, enter a new suspension category, and then select New.

> ***Warning***: *(**NSW DoE schools**) Policy restrictions exist. You should not allow new suspension categories or types.*

## To edit a suspension category:

1. Do one of the following:
    a. In the Wellbeing Setup section, select Suspensions.
    b. If Wellbeing Setup is already open, select Suspensions in the left menu.
2. Under Suspension Categories, select Edit next to a suspension category.

    > You can't edit built-in categories. Instead, consider adding a custom suspension type.

3. Update settings to suit your school's requirements.
4. Select Save.

## To remove a suspension category:

1. Do one of the following:
    a. In the Wellbeing Setup section, select Suspensions.
    b. If Wellbeing Setup is already open, select Suspensions in the left menu.
2. Under Suspension Categories, select Remove next to a suspension category.
3. Click OK to confirm.

> ***Warning:** (**NSW DoE schools**) System restrictions prevent you from editing a suspension category.*

## To add a suspension rule:

1. Do one of the following:
    a. In the Wellbeing Setup section, select Suspensions.
    b. If Wellbeing Setup is already open, select Suspensions in the left menu.
2. Under Suspension Rules, select Add Suspension Rule.
3. Select the suspension to which the rule will apply from the list.
4. Select the pre-requisite suspension.

5. Select Save.

> ***Note:*** *(NSW DoE schools) Although these are available for you to use, you don't need them. They are built-in for NSW DoE schools.*

## To edit a suspension rule:

1. Do one of the following:
    a. In the Wellbeing Setup section, select Suspensions.
    b. If Wellbeing Setup is already open, select Suspensions in the left menu.
2. Under Suspension Rules, select Edit.
3. In Edit Suspension Rule, update selections.
4. Select Save.

> ***Note: (NSW DoE schools)*** *Although these are available for you to use, you don't need them. They are built-in for NSW DoE schools.*

## To remove a suspension rule:

1. Do one of the following:
    a. In the Wellbeing Setup section, select Suspensions.
    b. If Wellbeing Setup is already open, select Suspensions in the left menu.
2. Under Suspension Rules, select Remove next to a rule.
3. In Edit Suspension Rule, update selections.
4. Select Confirm.

> ***Note: (NSW DoE schools)*** *If your school chooses to add a suspension rule, you will also be able to remove it. However, you should instead be using built-in rules.*

## To add a custom suspension type:

> ***Warning:*** *(**NSW DoE schools**) Policy restrictions exist. If you correctly set 'Allow New Suspension Types' to No, then you will not be able to add, edit, hide or restore a custom suspension type.*

1. Do one of the following:
    a. In the Wellbeing Setup section, select Suspensions.
    b. If Wellbeing Setup is already open, select Suspensions in the left menu.
2. Under Suspension Categories, select Edit next to a suspension category.
3. Under Suspension Types, enter a new suspension type name, and then select Add.

## To edit a suspension type:

> ***Warning:*** *(**NSW DoE schools**) Policy restrictions exist. If you correctly set 'Allow New Suspension Types' to No, then you will not be able to add, edit, hide or restore a custom suspension type.*

1. Do one of the following:
   a. In the Wellbeing Setup section, select Suspensions
   b. If Wellbeing Setup is already open, select Suspensions in the left menu.
2. Under Suspension Categories, select Edit next to the relevant suspension category.
3. Under Suspension Types, select Edit next to the suspension type.
4. In Edit Suspension Type, do one of the following:
   a. Update the name of the suspension type
   b. Choose whether to enable extra details for the suspension type.
5. Select Save.

### To hide a suspension type:

> ***Warning:*** *(**NSW DoE schools**) Policy restrictions exist. If you correctly set 'Allow New Suspension Types' to No, then you will not be able to add, edit, hide or restore a custom suspension type.*

1. In the Wellbeing Setup section, select Suspensions.
2. Select Remove next to a category, and then select OK. The suspension type moves to the Hidden Suspension Types section.

### To restore a hidden suspension type:

> ***Warning:*** *(**NSW DoE schools**) Policy restrictions exist. If you correctly set 'Allow New Suspension Types' to No, then you will not be able to add, edit, hide or restore a custom suspension type.*

1. In the Wellbeing Setup section, select Suspensions.
2. Under Hidden Suspension Types, select Show next to a suspension type to restore it.
3. To reorder the list of suspension types, use the drag handle icon ( ≡ ).

## Configure awards

The information you configure for awards defines how student achievements are managed across your school. It requires some careful planning.

Use the settings in the three sections below to customise Awards to suit your school's requirements:

- Award Options – to specify if and how your school manages awards
- Award Categories – to define the different types, levels and values of awards
- Award Nominations – to define rules to automatically nominate students for subsequent award achievements when they have achieved the award value goals that you set up.

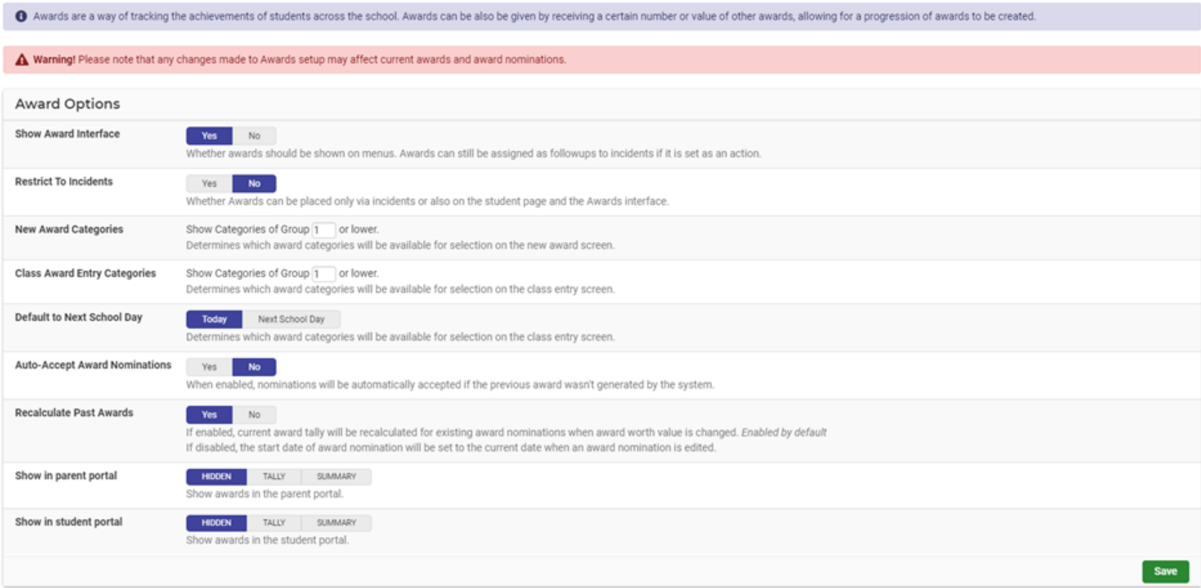



**Figure 9: Award Options - Example**

## To switch on Awards

1. Do one of the following:
   a. In the Wellbeing Setup section, select Awards.
   b. If Wellbeing Setup is already open, select Awards in the left menu.
2. Under Award Options, select Yes to show the Award interface.
3. Select Save.

## To configure award options:

Looking for ideas on setting up Awards for your school?

See Award categories in the Glossary section.

1. Do one of the following:
   a. In the Wellbeing Setup section, select Awards.
   b. If Wellbeing Setup is already open, select Awards in the left menu.
2. Under Award Options, update settings to suit your school's requirements.
3. Select Save.

## To add a new award category:

Award Categories enable you to define the different groupings of like awards and their point values.

Watch this video on our YouTube channel to learn about adding award categories. Wellbeing Setup – Add a new category

1. Do one of the following:
   a. In the Wellbeing Setup section, select Awards.
   b. If Wellbeing Setup is already open, select Awards in the left menu.
2. Under Award Categories, select Add Award Category.
3. Enter a category name and specify settings for the award category.
4. Select Save.

### To add an award to an award category:

1. Do one of the following:
    a. In the Wellbeing Setup section, select Awards
    b. If Wellbeing Setup is already open, select Awards in the left menu.
2. Under Award Categories, do one of the following:
    a. Select Edit next to an award category.
    b. Select the Award Category link.
3. Enter details for the award, and then select Save.

### To add award nomination rules:

1. Do one of the following:
    a. In the Wellbeing Setup section, select Awards.
    b. If Wellbeing Setup is already open, select Awards in the left menu.
2. Under Award Nominations, select Add Award Nomination.
3. Specify the rules that apply for the nomination.
4. Select Save.

### To edit the award category:

1. Do one of the following:
    a. In the Wellbeing Setup section, select Awards.
    b. If Wellbeing Setup is already open, select Awards in the left menu.
2. Under Award Categories, do one of the following:
    a. Select Edit next to an award category.
    b. Select the Award Category link.
3. In the top section, update details for the award category, and then select Save.

### To edit an award nomination:

1. Do one of the following:
    a. In the Wellbeing Setup section, select Awards.
    b. If Wellbeing Setup is already open, select Awards in the left menu.
    c. Under Award Nominations, select Edit next to a nominated award.
2. Update details for the award nomination, and then select Save.

### To remove an award nomination:

1. Do one of the following:
    a. In the Wellbeing Setup section, select Awards.
    b. If Wellbeing Setup is already open, select Awards in the left menu.
2. Under Award Nominations, select Remove next to a nominated award.
3. Select OK to confirm.

## Configure recipients

The information you configure in Recipients determines who gets notified when certain things happen. Firstly, you define a recipient (e.g. Welfare Coordinator) and then you add one or more users to the recipient.

Use Recipients to manage staff lists and role-based titles for both manual and automatic notifications relating to an incident. Some recipients are built-in, and some are linked to the Inbuilt Lists | Executive Types setup section. For example, if you create an executive type called Deputies, then the Executive Type is available to select as a recipient. However, you can also just create a recipient who isn't an executive.

Watch this video on our YouTube channel to learn about recipients. Wellbeing Setup – Recipients

For information on configuring the triggers, see [Configure notifications] or watch the video on Notifications.

## To specify default notification settings:

1. Select Setup and choose Manage User Accounts.
2. Under User Accounts in the left menu, select Notification Settings.
3. Under Default Notification Settings, choose settings.
4. Select Save.
5. For more on configuring default notification settings, see the Notification Settings section of the Sentral Setup Guide.
6. For information on users modifying their own notification settings via My User Profile, refer to the User Profile Guide.

## To choose a display type:

You can notify someone as part of the creation process, or by editing it later.

1. Do one of the following:
   a. In the Wellbeing Setup section, select Recipients
   b. If Wellbeing Setup is already open, select Recipients in the left menu.
2. Under Notification Recipients, select how you want the option to display for incidents.
3. Select a dropdown to make a dropdown list display in incident creation.

## To add a recipient:

1. Do one of the following:
   a. In the Wellbeing Setup section, select Recipients
   b. If Wellbeing Setup is already open, select Recipients in the left menu.
2. Under Notification Recipients Options, do one of the following:
   a. Select Add Recipients.
      i. Enter a name for the recipient role.
      ii. Select a user from the list to attach to the recipient. Repeat to select more users.
      iii. Select Save. The recipient displays at the bottom of the list.
   b. Select Import to import recipients directly from the Sentral data layer.
      i. Select users.
      ii. Select Import. The recipient displays at the bottom of the list.
3. To reorder the list of recipients, use the drag handle icon.

## To edit recipients and linked users:

If a staff member leaves or changes roles, follow these steps to modify the users.

1. Do one of the following:
   a. In the Wellbeing Setup section, select Recipients.
   a. If Wellbeing Setup is already open, select Recipients in the left menu.
2. Under Notification Recipients Options, select Edit next to a recipient.
3. In Edit Notification Recipient, do any of the following:
   a. Edit the recipient name.
   b. Select one or more users to attach to the recipient.
   c. Select one or more existing users to remove from the recipient.
4. Select Save.

## To edit a built-in recipient:

Edit built-in recipients from their source location:

- Executive Type recipients – from within the inbuilt lists.
- Class teacher recipients – from within your Admin or timetable system. This is where they draw their information from and need to be managed there.

### To remove a recipient:

1. Do one of the following:
   a. In the Wellbeing Setup section, select Recipients.
   b. If Wellbeing Setup is already open, select Recipients in the left menu.
2. Under Notification Recipients Options, select Remove next to a recipient.

   You can't remove or hide built-in lists such as Class Teacher. You could though remove an appropriate Executive Type.

3. Select OK to confirm.

## Configure notifications

The information you configure here manages the rules for when notifications get sent and who should receive them.

There are two ways notifications get triggered:

- Automatic notifications based on rules you specify

  One or more recipients will be sent a notification under certain circumstances. Each notification can have one or more rules which must be satisfied for a notification to be sent.
- Notifications from a follow-up action to an incident.

Your users can choose whether to receive these notifications as a dashboard notice or an email.

Watch this video on our YouTube channel to learn about notifications. Wellbeing Setup – Notifications

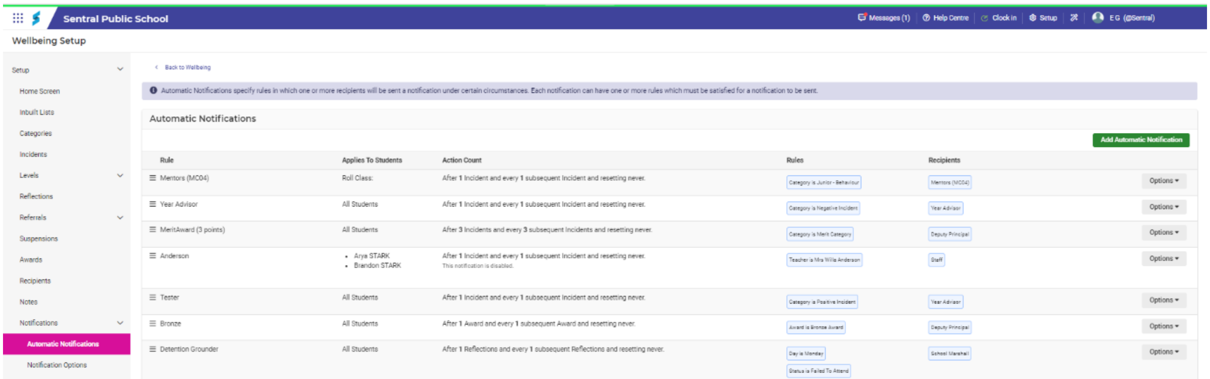



**Figure 10: Automatic Notifications - Example**

### To add an automatic notification:

Setting up the criteria is the first part of adding a notification.

1. Do one of the following:
   a. In the Wellbeing Setup section, select Notifications.
   b. If Wellbeing Setup is already open, select Notifications in the left menu, and choose Automatic Notifications.
2. Select Add Automatic Notifications.
   a. Enter details for the rule.
   b. Specify one or more rules for the notification.

Rules are ‘and’ rules, so it's important to construct rules that don't conflict. For example, if you set a rule where the Incident Category is ‘Positive’ and ‘Negative’ it will never trigger because an incident cannot be two things at the same time.

c. Choose who should receive the notifications.

d. Select Add.

## To reorder automatic notifications:

- Use the Drag handle icon ( ☰ ) to reorder items within the list.

## To disable an automatic notification:

1. Do one of the following:
    a. In the Wellbeing Setup section, select Notifications.
    b. If Wellbeing Setup is already open, select Notifications in the left menu, and choose Automatic Notifications.
2. Select Options next to a notification and choose Disable from the menu.
3. Select OK to confirm.

## To remove an automatic notification:

1. Do one of the following:
    a. In the Wellbeing Setup section, select Notifications.
    b. If Wellbeing Setup is already open, select Notifications in the left menu, and choose Automatic Notifications.
2. Select Options next to a notification and choose Remove from the menu.
3. Select OK to confirm.

### To edit an automatic notification:

System rules prevent you from editing an automatic notification rule if it has already been triggered. Instead remove the rule and create a new one.

1. Do one of the following:
   a. In the Wellbeing Setup section, select Notifications.
   b. If Wellbeing Setup is already open, select Notifications in the left menu, and choose Automatic Notifications.
2. Select Options next to a notification and choose Edit from the menu.
3. In Edit Automatic Notification, update fields and rules as required.
4. Select Save.

### To make a notification confidential:

1. Do one of the following:
   a. In the Wellbeing Setup section, select Notifications, and choose Notifications Options.
   b. If Wellbeing Setup is already open, select Notifications in the left menu, and choose Notifications Options.
2. Select the option to make notifications confidential – removing student's names from notifications.
3. Select Save.

## Configure notes

The information that you configure here allows you to set up categories and sub-categories of notes. Once you've set up categories, users can log confidential notes against student profiles and share the information according to the settings you define.

Watch this video on our YouTube channel to learn about notes. Wellbeing Setup – Notes

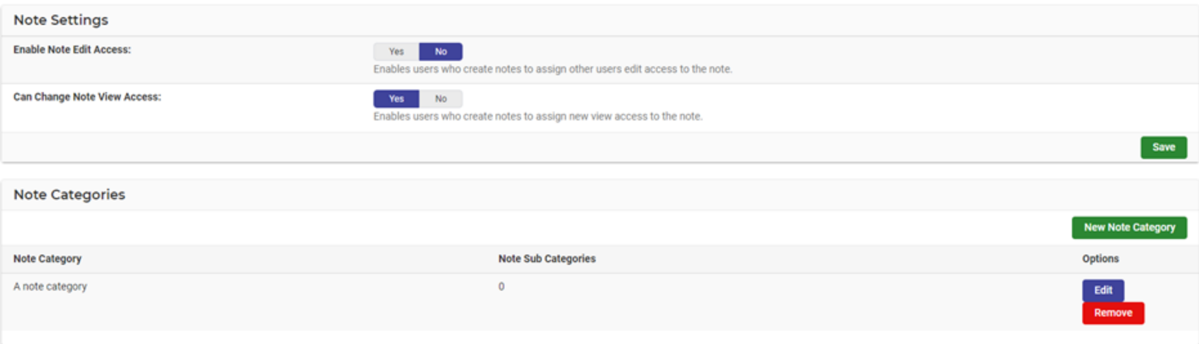



**Figure 11: Wellbeing Notes – Example**

### To configure note settings:

1. Do one of the following:
   a. In the Wellbeing Setup section, select Notes.
   b. If Wellbeing Setup is already open, select Notes in the left menu.
2. Under Notes Settings, choose whether you want users who create notes to be able to:
   — give edit access to other users (i.e. recipients or groups) to edit the note
   — give new view access to the note.
3. Select Save.

For more about setting up Groups, see Manage Roles in the main Sentral setup.

### To add a note category:

1. Do one of the following:
    a. In the Wellbeing Setup section, select Notes.
    b. If Wellbeing Setup is already open, select Notes in the left menu.
2. Under Note Categories, select New Note Category.
3. Enter a name for the category, and then select Save.

### To add a note sub-category:

1. Do one of the following:
    a. In the Wellbeing Setup section, select Notes.
    b. If Wellbeing Setup is already open, select Notes in the left menu.
2. Add a note category.
3. Select Edit next to the note category.
4. Under Note Sub Categories, select New Note Sub Category.
5. Enter a name for the sub-category, and then select Add.

### To remove a note category or sub-category:

1. Do one of the following:
    a. In the Wellbeing Setup section, select Notes.
    b. If Wellbeing Setup is already open, select Notes in the left menu.
2. Do one of the following:
    a. To remove a note category:
        i. Select Remove next to a category.
        ii. Select OK to confirm. If the category has sub-categories, they will also be removed.
    b. To remove a note sub-category without removing the top-level category:
        i. Select Edit next to the top-level category.
        ii. Under Note Sub Categories, select Remove next to the sub-category.
        iii. Select OK to confirm.

### To edit a note category or sub-category:

1. Do one of the following:
    a. In the Wellbeing Setup section, select Notes.
    b. If Wellbeing Setup is already open, select Notes in the left menu.
2. Do one of the following:
    a. To edit a note category:
        i. Select Edit next to a category.
        ii. Under Note Category Settings, enter a new name for the note category.
        iii. Select Save.
    b. To edit a note sub-category:
        i. Select Edit next to a note category.
        ii. Under note Sub Categories, select Edit next to a note sub-category.
        iii. In Rename Note Sub Category, enter a new name.
        iv. Select Save.

## Configure Details Summary

The information that you configure here defines the detail fields to be captured when logging an incident. Some are already built-in, but you can add to the list either here or via the Incident Type edit screen.  This screen list also shows which Incident Categories and Types are using certain Details.

Watch this video on our YouTube channel to learn about the Details Summary area of Wellbeing.
Wellbeing setup – Details summary

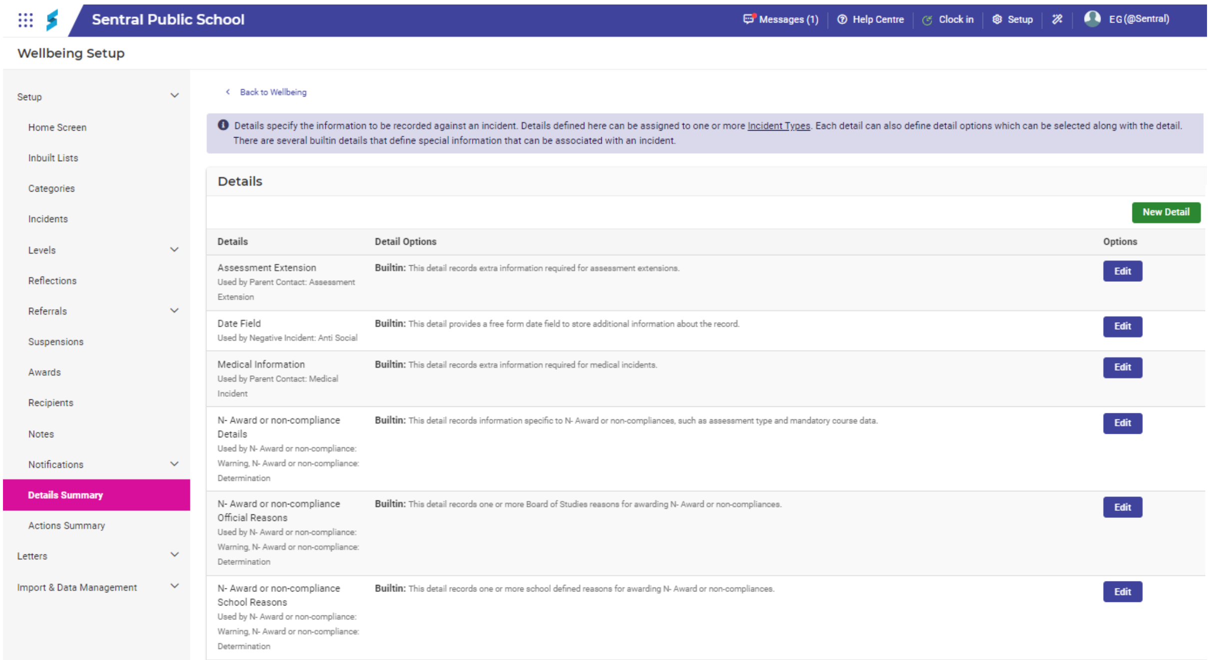
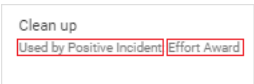



**Figure 12: Details Summary - Example**

Details Summary displays built-in details first, followed by any custom details you add. It displays the custom details in alphabetical order.

## To identify incident category and incident type for a Detail:

1. Do one of the following:
   a. In the Wellbeing Setup section, select Details Summary.
   b. If Wellbeing Setup is already open, select Details Summary in the left menu.
2. In the Details column, check the description under the detail name that starts with ‘Used by…incident’. This shows the incident category, followed by the related incident type.

   In this example, one of the details that can be recorded against an incident is ‘Clean up’, and it is associated with a category called Positive Incident and an incident type called Effort award.

## To identify how the detail relates to existing incidents:

1. Do one of the following:
   a. In the Wellbeing Setup section, select Categories.
   b. If Wellbeing Setup is already open, select Categories in the left menu.
2. Under Categories, locate the category (e.g. Positive Incident), and select Edit.
3. Under Incident Types, locate the incident type (e.g. Effort Award), and select Edit.
4. Under Incident Details, locate the incident detail (e.g. Clean up).

## To add a new detail to an incident from Details Summary:

### Add the new detail

1. Do one of the following:
   a. In the Wellbeing Setup section, select Details Summary.

    b. If Wellbeing Setup is already open, select Details Summary in the left menu.
2. Select New Detail.
3. Enter a name for the detail, and then select Add.
4. Select Close.

   The Detail displays in alphabetical order on the Details Summary screen.

### Add the detail to an incident category and associate it to an incident type

1. In the Wellbeing Setup section, select Categories.
2. Select Edit next to a category.
3. Under Incident Types, select Edit next to an incident type.
4. Under Incident Details:
    a. Select Add Incident Detail.
    b. Select the detail from the Detail dropdown list.
    c. Select Add.

## Configure Actions Summary

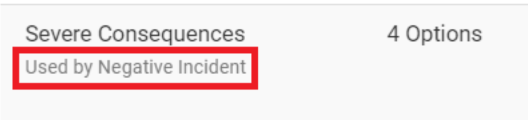
The information that you configure here defines the actions that can take place when resolving an incident. Some are already built-in, but you can add to the list to suit your school's requirements – either here or via the Category Details edit screen.

This screen list also shows which Incident Categories are using certain Actions.

Watch this video on our YouTube channel to learn about the Details Summary area of Wellbeing.
Wellbeing setup – Actions summary

### To identify incident category for an Action:

1. Do one of the following:
    a. In the Wellbeing Setup section, select Actions Summary.
    b. If Wellbeing Setup is already open, select Actions Summary in the left menu.
2. In the Actions column, check the description under the Action name that starts with 'Used by…incident'. This shows the incident category.




   In this example, one of the actions that can be used to resolve an incident is 'Severe Consequences', and it is associated with the Negative Incident category.

### To add a follow-up action from Actions Summary:

1. Do one of the following:
    a. In the Wellbeing Setup section, select Actions Summary.
    b. If Wellbeing Setup is already open, select Actions Summary in the left menu.
2. Select New Action.
3. Enter a name for the action, and then select Add.
4. Under Action Details, do one of the following:
    a. Accept the default information and select Close.
    b. Specify settings:
        i. Select to include a quantity and specify the value.
        ii. Select a display type option.
        iii. Select Save, and then select Close.

The Action displays in alphabetical order on the Actions Summary screen – but is not yet associated with an incident category.

## To associate the action with a category:

1. First, add an action from the Actions Summary page. See above.
2. Select Categories in the left menu.
3. Select Edit next to a category.
4. Under Follow Up Actions, select Add Follow Up Action.
5. Select the previously created action from the list.
6. Select Add. The follow-up action displays at the bottom of the list.

## To add a follow-up action from Categories

1. Do one of the following:
   a. In the Wellbeing Setup section, select Categories.
   b. If Wellbeing Setup is already open, select Categories in the left menu.
2. Select Edit next to a category.
3. Under Follow Up Actions, select Add Follow Up Action.
4. Enter a name for the new action.
5. Either enter an override name for the action or leave this field blank.
6. Select Add.
7. Under Action Details, do one of the following:
   a. Accept the default information and select Close.
   b. Specify settings:
      i. Select to include a quantity and specify the value.
      ii. Select a display type option.
      iii. Select Save, and then select Close.

   The Action displays in alphabetical order on the Actions Summary screen.

## To configure a follow-up action

1. First, add a follow-up action. See above.
2. Under Follow Up Action, select Options and then Configure Follow Up Action from the menu.

## To add, edit, or remove an action option:

1. First, add an Action. See above.
2. Select Edit next to the newly created Action.
3. To add an action option:
   a. Under Action Options, enter a name for the new action option.
   b. Select Add. The new action displays at the bottom of the Action Options list.
4. To edit an action option:
   a. Under Action Options, select Edit next to an action option.
   b. In Edit Action Option, update the option name
   c. Select Save.
5. To remove an action option:
   a. Under Action Options, select Remove next to an action option.
   b. Select OK to confirm.

## To reorder follow-up actions:

- Use the Drag handle icon ( ☰ ) to reorder items within the list.

## Configure letters

The information you configure here controls the way letters are generated from incidents.

### Overview

The following three menu items work together to generate letters:

- Manage Layouts – defines the format of the letters, including headers, address details, and the general layout of the letters within your system. Letters can have varied layouts.
- Manage Letters – used to create and edit all letters, letter categories, layouts and menu options
- Letters Repository – provides access to a library of standard letter templates supplied by Sentral Education.

Your school will have a variety of reasons to use letters, including printing certificates, suspensions letters, counsellor referrals, etc. However, before users can print a letter, a layout must be set up.

Watch this video on our YouTube channel for an overview of the Letters function of Wellbeing. Wellbeing setup – Letters overview

### To control default letter layout

Layouts control the appearance of your letters. If your school is new to Sentral you might only see the default layout. You can create your own layouts.

Watch this video on our YouTube channel to learn about letter layouts – a pre-requisite to creating a template. Wellbeing setup – Managing letter layouts

1. Do one of the following:
    a. In the Wellbeing Setup section, select Manage Layouts.
    b. If Wellbeing Setup is already open, select Letters in the left menu and choose Manage Layouts.
2. Select Edit next to Default Layout.
3. In Edit Layout Design, select the Details tab.
   This is where you can view, and make changes to letter details, styles and information components.

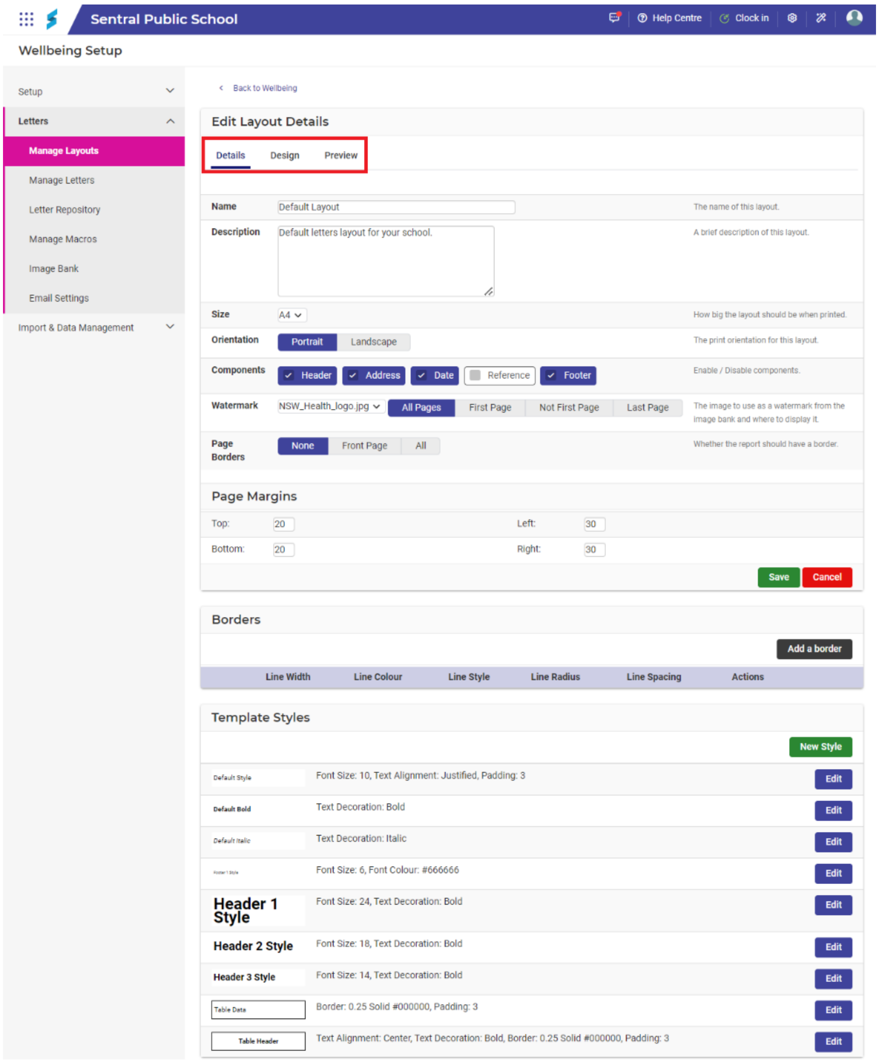



**Figure 13: Edit Layout Details screen – Details tab**

4. Select the Design tab.
   This is where you can view and make changes to the layout of the components selected in the Details tab.

> Your edit options here are for styling and layout – how the content behaves rather than what it says. The content is pulled from various parts of the system and is determined by the components selected.

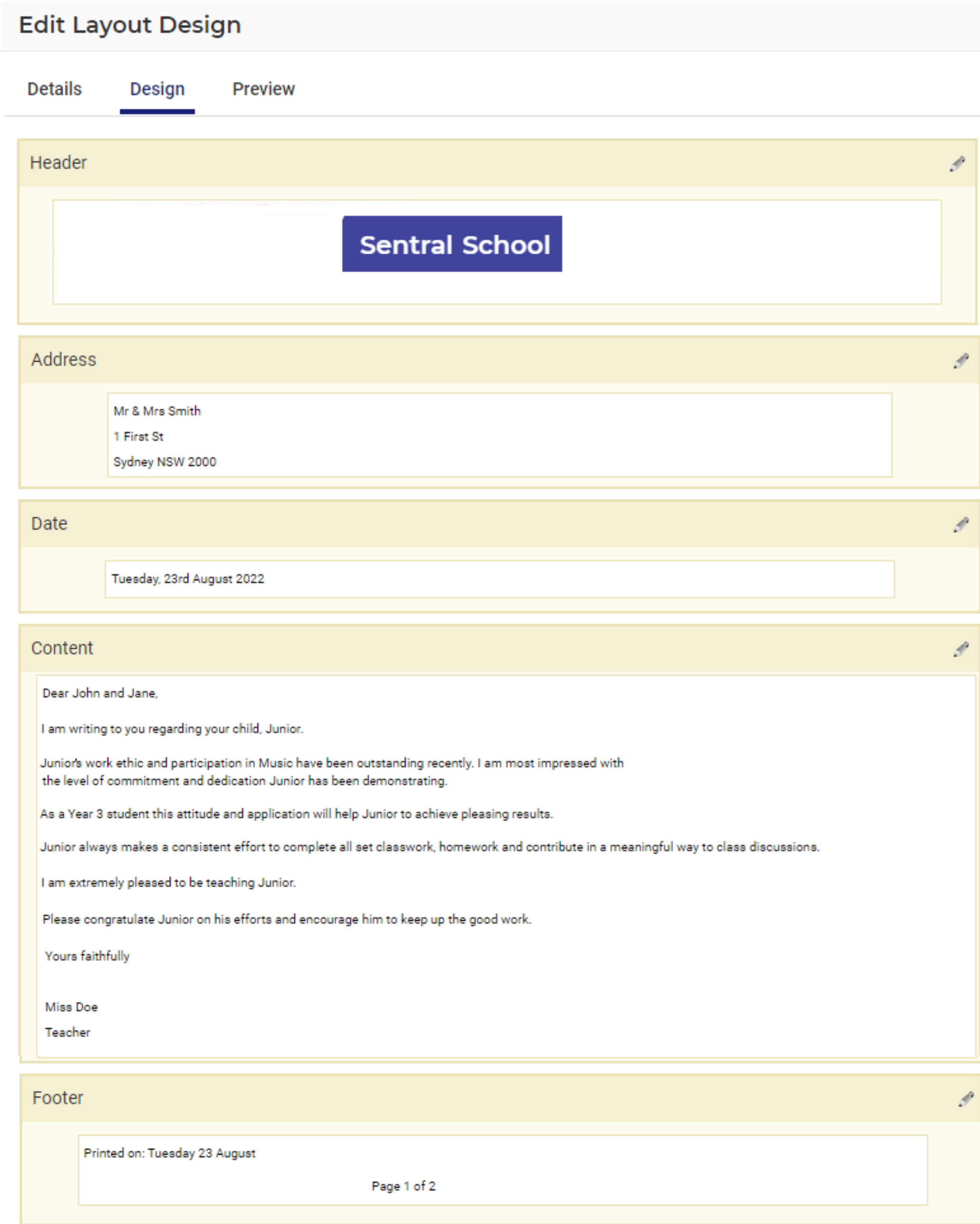



**Figure 14: Edit Details screen - Design tab**

5. Select the Preview tab to check the effect that your selections have on the letter's layout and appearance.

## To add a new letter group:

1. Do one of the following:
    a. In the Wellbeing Setup section, select Manage Letters.
    b. If Wellbeing Setup is already open, select Letters in the left menu and choose Manage Letters.

    Existing letter templates are displayed in groups.
2. Under Letter Groups, enter a new group name, and then select Add Letter Group.

## To edit a letter group:

1. First, add a new letter group. See above.
2. Under the relevant letter group heading, select Edit Group.
3. (Optional) Update the group name.
4. Select incident categories applicable for the letter group.

5. Select Save.

## To remove a letter group:

1. Do one of the following:
   a. In the Wellbeing Setup section, select Manage Letters.
   b. If Wellbeing Setup is already open, select Letters in the left menu and choose Manage Letters.
2. Under the relevant letter group heading, select Remove.

## To add a new letter template

Watch this video on our YouTube channel to learn about creating letter templates. Wellbeing setup – Creating letter templates

1. Do one of the following:
   a. In the Wellbeing Setup section, select Manage Letters.
   b. If Wellbeing Setup is already open, select Letters in the left menu and choose Manage Letters.
   Existing letter templates are displayed in groups.
2. View the groups and do one of the following:
   a. Under a group heading, select Add Letter Template.
   b. If there is no suitable group, then create one. See above.
3. Enter a name and description.
4. Choose a type and layout.
5. Select Add.
6. The template displays in the list – ready for you to configure it.

## To edit a letter template:

1. First, add a template. See above.
2. Either select the template name to open it or select Options and choose Edit from the menu.
3. The template opens in edit mode. The components displayed are determined by the layout selected during template creation.
4. Select Edit next to Text Component. An empty text box opens for you to enter letter content.
5. Enter the body of your letter.
6. To automate the letter details as much as possible, use the menus to enter placeholders for various pieces of information.

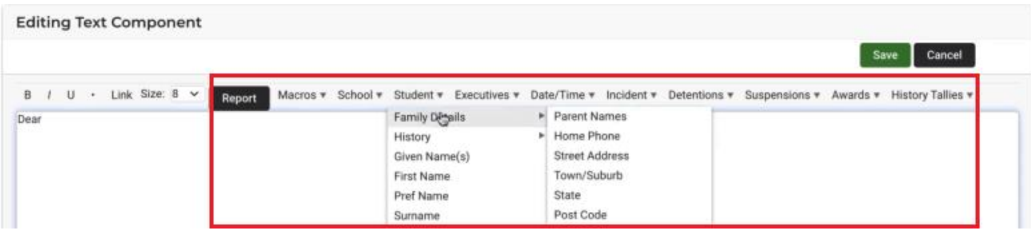



**Figure 15: Example text component of letter template**

7. Under Styling, choose text and styling options.
8. Select Save.
9. Select Preview to check the letter.

## To hide a letter:

1. Do one of the following:
   a. In the Wellbeing Setup section, select Manage Letters.
   b. If Wellbeing Setup is already open, select Letters in the left menu and choose Manage Letters.
   Existing letter templates are displayed in groups.

2. Select Hide next a letter.

### To import a pre-made letter template:

1. Do one of the following:
   a. In the Wellbeing Setup section, select Letter Repository.
   b. If Wellbeing Setup is already open, select Letters in the left menu and choose Letter Repository.
   Existing letter templates are displayed in groups.
2. Select import next to a template.
3. In Import Letter Template:
   a. Either enter a name for the template or accept the default name.
   b. Choose a letter group for the template – the group within which it will sit when imported.
4. Select Save. The template displays in Manage Letters under the group you selected.

### To upload your own template:

1. Do one of the following:
   a. In the Wellbeing Setup section, select Letter Repository.
   b. If Wellbeing Setup is already open, select Letters in the left menu and choose Letter Repository.
2. Select Upload Letter Template.
3. In Upload Letter Template, select Choose File.
4. Browse to the file location and select the .xml template file.
5. Select Upload.

### To add a new macro:

Macros allow you to define your own merge fields which can be inserted into your letter templates. This allows you to define common phrases, mottos or roles and names once and then use them in letters.

1. Do one of the following:
   a. In the Wellbeing Setup section, select Manage Macros.
   b. If Wellbeing Setup is already open, select Letters in the left menu and choose Manage Macros.
2. In new macros, enter a name and description for the macro, and choose a macro type.
3. Enter text for your macro (e.g. common phrase, school motto).
4. Select Save.
5. The macro is available for selection under 'Macros' when you open a template and choose to edit the Text component.

### To remove a macro:

1. Do one of the following:
   a. In the Wellbeing Setup section, select Manage Macros.
   b. If Wellbeing Setup is already open, select Letters in the left menu and choose Manage Macros.
2. Under Manage Macros, select Remove next to the macro.
3. Select OK to confirm.

### To upload a new image to the image bank:

1. Do one of the following:
   a. In the Wellbeing Setup section, select Image Bank.
   b. If Wellbeing Setup is already open, select Letters in the left menu and then Image Bank.
2. Select Choose file and select an image file.
3. Select Upload. The image is available to be inserted into letters as logos, signatures, etc.

## To manage email settings:

Set the properties used when sending letters via email to parents.

1. Do one of the following:
   a. In the Wellbeing Setup section, select Email Settings.
   b. If Wellbeing Setup is already open, select Letters in the left menu and then Email Settings.
2. Specify the following letter email options:
   a. Enter a subject line prefix to use for welfare letter emails.
   b. Enter the reply-to address for welfare letter emails.
   c. Choose whether to create a letter per student contact or one letter per student.
3. Select Save.

## To create a certificate layout

This is stage one of creating an award certificate.

1. Do one of the following:
   a. In the Wellbeing Setup section, under Letters, select Manage Layouts.
   b. If Wellbeing Setup is already open, select Letters in the left menu and then Manage Layouts.
2. Select New Layout.
3. Add a name and description for your layout.
4. Disable components that are not applicable for the certificate.
5. Components define whether you are going to generate the header, address, and date items on your letter. This may NOT be applicable for an achievement certificate. The display footer option determines whether the page numbers and the date are printed on the bottom of the letter using this layout. This may NOT be applicable for an achievement certificate.
6. (Optional) Select a watermark from the list.
7. To use a watermark that you may have created in another program, you have to first upload it to the image bank so that it is available for selection in the dropdown list.
8. (Optional) Select a border setting.
9. Select Save. Addition style options display.
10. (Optional) Specify boarder options
11. Specify template styles.
12. If you edit a template style, this will modify the style for ALL letters and certificates using this template.

To edit styles of a specific layout, go back to Letters > Manage Layouts and select the hyperlinked name of the layout.

To edit the Content component (i.e. the words), create a letter template. See To add a new letter template

## To add a certificate template:

Certificates are categorised into Groups. Groups enable you to define which certificates are displayed when a teacher generates against an incident. See To add a new letter group:

1. Do one of the following:
   a. In the Wellbeing Setup section, under Letters, select Manage Letters.
   b. If Wellbeing Setup is already open, select Letters in the left menu and then Manage Letters.
2. Select Add Letter Template to add a template to a group.
3. Enter a label for the certificate and add a description
4. Select the applicable layout from the list.

5. For example, you might have a Certificate Template called ‘Science Award’ which uses the ‘Specialist Awards’ Layout.

### To edit a certificate:

1. Do one of the following:
   a. In the Wellbeing Setup section, under Letters, select Manage Letters.
   b. If Wellbeing Setup is already open, select Letters in the left menu and then Manage Letters.
2. Select the hyperlinked letter name or select Options next to the letter and choose Edit.
3. The components that you see are determined by the letter layout associated with the letter template. You can add extra components if you need them without going back to the Letter Layout screen.
4. The ability to add additional text components allows you to apply different styles to different blocks of text. For example, the styling you apply to the student’s name on a certificate might be very different to how you want the reason for why they are receiving the certificate.
5. To edit the letter, including adding content such as a student’s name and the date, select Edit next to the component.
6. (Optional) Use the Drag handle icon ( ☰ ) to reorder components.
7. (Optional) Use the merge fields displayed when you edit the Text component. The merge fields available for use in Awards templates allow you to include the name of the person who issued the award as opposed to the class teacher of the student. These merge fields include: {AwardIssuerTitle}, {AwardIssuerName} and {AwardIssuerShortName}. They match the equivalent formatting for the class teacher merge fields.
8. Select Save.

## Import and data management

You might want to use these Wellbeing functions in the following scenarios:

- You have imported data from an external system
- Your leadership team has re-designed your school’s incident category/incident type structure, and you want to make the existing incidents conform to the new structure.

### To bulk move incidents from one category to another:

1. Do one of the following:
   a. In the Wellbeing Setup section, under Import & Data Management, select Data Mapping.
   b. If Wellbeing Setup is already open, select Import & Data Management in the left menu and then Data Mapping.
2. Choose ‘from’ and ‘to’ mapping options for an incident and select the source.
3. To map more incidents, select Add Rule, and then repeat step 2.
4. Once you’ve finished, select Map Incidents.

### To import a Compass Chronicle file:

1. Do one of the following:
   a. In the Wellbeing Setup section, under Import & Data Management, select Compass Chronicle.
   b. If Wellbeing Setup is already open, select Import & Data Management in the left menu and then Compass Chronicle.
2. Select Choose File and upload the export file.
3. Check the headings in your file match those on the Compass Chronicle screen.
4. Select Import.

# Sentral versions

## Overview

Use the table below to confirm your school's version of Sentral. This helps you understand the Sentral modules and features available at your school.

**Table 1: Product versions**

| Product | Customer | Description | How to check |
|---|---|---|---|
| Sentral Classic<br>On-Premise | Single Tenant (ST) | Original single-school offering<br>On-Premise | Hover over the bottom-left status bar |
| Sentral Cloud | Single Tenant (ST) | Hosted version of on-premise solution | Hover over the bottom-right status bar |
| Sentral Enterprise | Multi Tenant (MT) | Cloud-only platform<br>Supports multi-school campus schools<br>Significantly expanded features for independent schools and department-wide deployments. | Hover over the bottom-left status bar |

# Glossary

## Inbuilt lists

Used to customise global lists for Periods, Executive types, Teachers, Locations, Faculties, Subjects and Extended Resolutions.

- Periods: Define approximately when an incident occurred during the day.
- Executive Types: Define Executive types attached to school years.
- Teachers: Define the staff member who reported the incident. You can sync this with the Data Layer in Sentral.
- Locations: Define the list of possible locations where incidents may occur. Examples include: Classroom, Playground, Elsewhere on school grounds, On Excursion, On Camp, On Bus, On Train, At the bus stop, Off Campus.
- Faculties and Subjects: Define N-Awards but can also be assigned for other incidents.
- Extended Resolutions: Optional information for how an incident was completed or why further action is required.
- Completed Resolution: Tags the relevant executive or Year Advisor.
- Further Action Required Resolutions may involve sending the student to another staff member for further action.

## Categories and incident types

**Table 3: Categories and incident types (examples)**

| Category | Types | Follow-up action |
|---|---|---|
| Negative Incident | Attendance, Behaviour, Uniform, Academic | Time of arrival at time out, Detention, notify teacher who reported incident and home group teacher, Tick if parents were |

| Category | Types | Follow-up action |
|---|---|---|
| | | contacted, Suspension, N Determination warning letter issued |
| Data Record | Medical Incident, Referrals, Parent Contact, Meeting with Student | Notification, Tick if Parents were contacted |
| N-Award | Warning, N Award (Non-Completion), Misadventure, Incorrect Submission of Task | Interview Request, Notification |
| Positive Incident | Academic, Attendance, Behaviour, Extra Curricular, Academic, Negative – Suspensions (NSW Department of Education schools) | Notification, Certificates, Award |

## Referral types

The table below shows the four default referral types with an example list of sub-types of support defined under each type.

**Table 4: Example of referral types**

| Type | Referrals | Diagnosed disorders | In-school support | Itinerant support |
|---|---|---|---|---|
| Example sub types | Careers advisor<br>ESL Referral<br>Hearing Referral<br>Learning Enrichment Team<br>Occupational Therapy<br>Paediatric Referral<br>Reading Recovery<br>Repetition of Grade<br>Special Placement<br>Speech Therapy<br>Vision Referral<br>Year Advisor | Attention Deficit<br>Attention Deficit/Hyperactivity<br>Autism/Asperger's<br>Hearing Disability<br>Language Disability<br>Mental Health<br>Mild Intellectual Disability<br>Moderate Intellectual Disability<br>Physical Disability<br>Severe Intellectual Disability<br>Vision Disability | Counsellor at school<br>Funding Support<br>Learning Support Team<br>School Behaviour Modification<br>Support Teacher Learning Assistance | Behaviour<br>Hearing<br>Integration<br>Language<br>Vision |

## Award categories

The Award Categories are used to define the different types, levels and values of awards. The actual award descriptions (e.g. Effort, Creativity, Citizenship, etc.) are usually created under lowest value or first Group. You might create several categories of awards all belonging to Group 1.

Under each category, you can add the actual award along with two numerical values.

- Value – corresponds to the number of points the award is worth in the Awards System.
- Point Value – for adding points to the student's house.
  Tip: Some schools use the same Category number as the Value of the awards.
- Award Nominations – rules to automatically nominate students for subsequent Award achievements when they have achieved the award value goals that you set up.

## Award nominations

The two key fields to understand in the Award Nominations section are:

- Source Award Category Group: denotes the source award group for the Nominated Award. e.g.  Group 1 is the source award Category for Award in Group 5.
- Source Award Value Total: denotes how many of the Source Category Awards the student must receive to achieve the nomination.

## Award system examples

**Table 5: Example of simple merit award system**

| Award categories | | |
|---|---|---|
| **Category** | **Awards** | **Group** |
| Class Award | 1 | 1 |
| Merit Award | 1 | 2 |
| Excellence Award | 1 | 3 |
| Assistant Principal's Award | 1 | 4 |
| Principal's Award | 1 | 5 |

**Table 6: Example of Specialist teachers end of year award system**

| Award categories | | |
|---|---|---|
| **Category** | **Awards** | **Group** |
| Weekly Specialist Awards | 5 | 1 |

The 5 awards might include: Science Award, Music Award, Art Award, Library Award and PE Award.

**Table 7: Example of Specialist teachers end of year award system (continued)**

| Award nominations | | | |
|---|---|---|---|
| **Nominated award** | **Reset period** | **Source Award category group** | **Source Award value total** |
| End of Year Specialist Award | Never | 1 (Weekly Specialist Award) | 10 |

## Inbuilt lists example

### Table 8: Inbuilt list examples

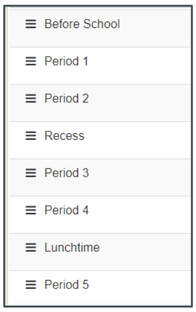
<table>
<tr>
<td>Periods</td>
<td>Defines when an incident occurred.<br>Examples include:<br>— Before school<br>— Morning tea<br>— Lunch<br>— After school.</td>
<td>

Figure 16: Periods example</td>
</tr>
<tr>
<td>Executive types</td>
<td>This is the list of all executive types in your school. This includes:<br>— Deputy Principal(s)<br>— Year Advisors<br>— Principal’s Assistants.</td>
<td>

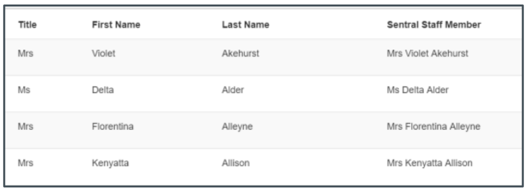
Figure 17: Executive types example</td>
</tr>
<tr>
<td>Teachers</td>
<td>Teachers define the staff member who reported the incident.<br>Teachers can be manually entered (CRTs) or imported from the list of teachers in the data layer.</td>
<td>

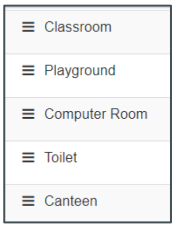
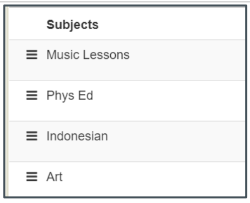
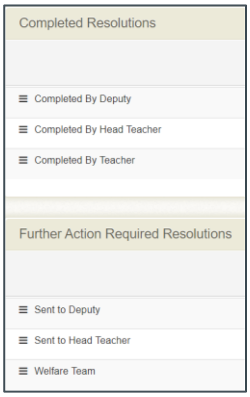
Figure 18: Teachers example</td>
</tr>
<tr>
<td>Locations</td>
<td>Locations define where the incident occurred.<br>This can be helpful in identifying areas within the school that may need additional supervision or review of policies.</td>
<td>

Figure 19: Locations example</td>
</tr>
<tr>
<td>Faculties and Subjects</td>
<td>Faculties and Subjects, whilst mostly used in high school environments can also be useful for primary schools. They can be used to define the subjects in which an incident has occurred. For example, Science, Choir or Electives Program.<br>A Head Teacher can also be assigned where appropriate.</td>
<td>

Figure 20: Faculty example</td>
</tr>
</table>

| | | |
|---|---|---|
| | | <br>**Figure 21: Subjects example** |
| **Extended resolutions** | Extended resolutions are optional information that can be supplied as to how an incident was completed or why further action is required. It is particularly useful for following up incidents.<br><br>If a resolution is removed from the list, it will remain attached to previous records where it was used. | <br>**Figure 22: Extended resolutions example** |

## Configuration checklist – roadmap ideas

Use the table below for ideas on getting your Wellbeing module up and running in no time.

**Table 9: Configuration checklist**

| Module | Checklist | Review frequency |
|---|---|---|
| Home screen | Review options for what information is available on the home screen.<br><br>Tip: This is also a good stage to review each function and decide which functions your school will be using. For example, Levels, Detentions, Referrals, Suspensions, etc. | On an annual basis – January |
| Inbuilt lists | Define each list and decide if your school will use Extended resolutions. | Review these lists on a term-by-term basis.<br><br>Ensure Teachers are updated with any changes to staffing. |
| Categories | Start with a spreadsheet that lists each category of Incident and the sub-types, and any follow-up actions applicable for each category. | Review these lists on a term-by-term basis.<br><br>Ensure Teachers are updated with any changes to staffing, particularly with respect to follow up actions. |
| Incidents | Wellbeing team to agree on these settings. | Review on an annual basis. |

| Module | Checklist | Review frequency |
|---|---|---|
| Levels | Decide if your school will use Levels and how the levels will be set and reset.<br>For example, allow students to be placed (either manually or via an incident) on levels and reset the levels back to the default at the end of the week. In this way, students can be recognised for achieving positive levels and on a weekly basis. | Review the Levels setup on an annual basis to ensure it is still meeting the requirements of your school. |
| Detentions | Gather the information around how detentions are managed at your school.<br>Decide if Detentions will be displayed in the Student and Parent Portals. | Review this setup on an annual basis or as needed.<br>Ensure Teachers are updated with any changes to staffing. |
| Referrals | Prepare a list of Referral sub-types and Referral Reasons. | Review these lists on an annual basis. |
| Suspensions | Prepare a list of Suspension categories and types and review logical settings. | Review these lists on an annual basis. |
| Awards | Prepare a list of Award categories and nominations and review logical settings. | Review these lists on a termly basis. |
| Recipients | Prepare a list of Recipients and members of each label.<br>Tip: Some schools simply enter a label for each staff member, but in large schools this becomes confusing, and errors can occur when trying to select all the relevant recipients for a given circumstance. | Review these lists on a termly basis.<br>Ensure Teachers are updated with any changes to staffing. |
| Notes | Prepare a list of Categories and Sub-Categories. | Review these lists on an annual basis. |
| Notifications | Prepare a list of Notifications based on events and which staff need to be notified. | Review these lists on an annual basis.<br>Ensure Teachers are updated with any changes to staffing. |
| Details summary | Prepare a list of Incident Details and Options to use for recording Incidents. | Review these lists on a termly basis.<br>Ensure Teachers are updated with any changes to staffing. |
| Actions summary | Prepare a list of Incident Actions and Options to use for recording Incidents. | Review these lists on a termly basis.<br>Ensure Teachers are updated with any changes to staffing. |
| Letters | Check the Attendance letters currently being used.<br>Decide who will implement them into this section.<br>Review template approvals.<br>Test each template. | On an annual basis – January. |
| Import & Data Management | Obtain export INI and DAT files from RISC database (if applicable) | |