Qoria

Organisation/District:	
Name:	**Date:**

This checklist is for **Designated Safeguarding Leads**.

What	Details	Done	Not Required[1]	Notes
School data and reports	Run reports for the previous academic year. Go to **Record Manager** > **Reports** > **New Record Manager Report**.			
Students' information (CSV upload)	Import students' data. Complete and upload the CSV template in **Record Manager** > **CSV Upload Student Data**.			
Students' information (Wonde)	Import students into **Record Manager** > **Via automated Wonde Sync.**			
	Ensure students' details are all correct in the MIS.			
	Check that students are marked as "on roll" in the MIS.			

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[1] Mark the action as **Not Required** if a checklist item is not used or applicable at your school.

Qoria

What	Details	Done	Not Required	Notes
	Check that if students have been allocated UPNs, that they are added to the MIS.			
	Update students' years in the MIS.			
	Update students' classes in the MIS.			
Outgoing students	Transfer the Safeguarding Records of former students to their new school (via the **Transfers** section).			
	Check that outgoing students' profiles have an **end date** OR marked as "off roll" on your MIS.			
Staff members	Add new staff members in the User Manager. (Go to **Record Manager** > **Admin** > **User Management** > **Add Users**).			
	Ensure staff can sign into Record Manager.			
	Ensure the right staff have Multi-Site Access.			
	Check that staff members' SSO credentials are up to date.			
	Check that your (and other DSLs') 2FA are up to date.			

Qoria

What	Details	Done	Not Required	Notes
	For staff members who forgot their passwords, ensure they perform a password reset.			
	Confirm staff members' names or change of names. **Note:** Staff can edit their names by going to **Record Manager** > **My Account**.			
	Disable previous staff members' accounts.			
School information	Notify Wonde if your school has changed its MIS provider.			
	Check if your school has changed its SSO provider.			
	(Multi-Academy Trusts) Set up Record Manager accounts for new schools.			
	(Multi-Academy Trusts) Contact Support to set up CSV upload to the new school.			
Others	Ensure emails from Smoothwall or Record Manager are allowed.			
	Check that staff have completed the Safeguarding Training course for the current year.			

What	Details	Done	Not Required	Notes
	Update school documents in the Document Manager.			
	Update Notification Settings in **Record Manager** > **Admin** > **Notification Settings**.			

Additional notes: