

Record Manager Start of Year Maintenance Checklist



School/Organisation	<input style="width: 100%; height: 20px;" type="text"/>		
Name	<input style="width: 100%; height: 20px;" type="text"/>	Date	<input style="width: 100%; height: 20px;" type="text"/>

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

*Mark the action as "Not Applicable" (N/A) if a checklist item doesn't apply.

#	Action	Description	Done*	Notes
1	(Optional) Export reports for the previous academic year.	Export Record Manager reports for the previous academic year for your records before updating user information for the new year.		
2	Update School/Organisation information.	Notify Wonde if your school has changed its Management Information System (MIS) provider.		
		(Multi-Academy Trusts) Set up a Record Manager instance for new schools in your Trust.		
3	Ensure you receive emails from Record Manager.	Check your spam and content filters to ensure you can receive emails from Smoothwall or Record Manager .		
4	Update your School/Organisation's documents.	Upload your School/Organisation's documents to Record Manager from the Account icon > Document Manager .		

#	Action	Description	Done*	Notes
5	Check the email settings in Record Manager	Ensure you configure email notifications for the correct groups in Record Manager.		
6	Check staff accounts and permissions.	Add new staff members to Record Manager.		
		Ensure staff can sign in to Record Manager.		
		Staff can reset their Record Manager password if needed.		
		Ensure that staff who need Multi-Site Access have permissions.		
		Check that staff credentials are up-to-date in your Single Sign-on (SSO) system.		
		Ensure you and other DSLs have MFA (Multi-Factor Authentication) set up.		
		If a staff member has changed their name, ask them to update their name in Record Manager.		
		Turn off previous staff members' accounts.		
		Check that staff have completed the Safeguarding Training course for the current year.		

#	Action	Description	Done*	Notes
7	Sync or import Student data	If you sync Student data from Wonde. In Wonde: <ul style="list-style-type: none"> • Ensure all students’ details are correct. • Ensure students are marked as “on roll” Ensure each student has a Unique Pupil Number (UPN).. • Update students’ years.. • Update students’ classes. 		
		If you import student data using CSV Upload: Create the Student List CSV , then upload the CSV file to Record Manager .		
8	Check and transfer any outgoing students	Transfer the Safeguarding Records of former students to their new school from Record Manager > Transfers .		
		Ensure that outgoing students’ profiles have an end date , or mark them as “off roll” in your MIS.		