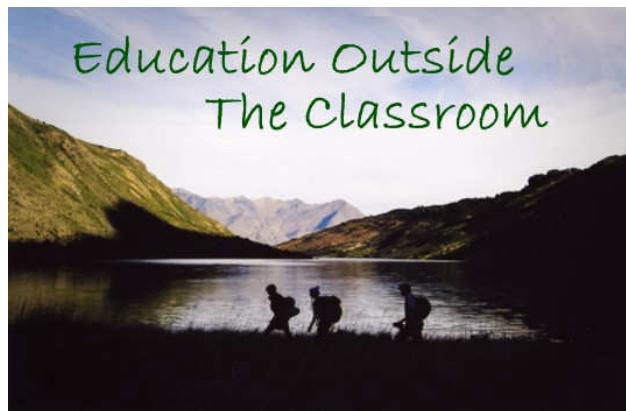


# ***Education Outside The Classroom***

## ***An EOTC Management Package for Schools***



***Worsfold Software Ltd  
January 2011***

<b>Date</b>	<b>Detail</b>	<b>Version</b>	<b>Person</b>
23 January 2011	First release	1.0.1	Rory Butler

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## **Contents**

<b>Chapter</b>	<b>Page</b>
<b>0. Licensing and Warranty information</b>	<b>vii</b>
<b>Conventions</b>	<b>ix</b>
<b>Thanks</b>	<b>x</b>
<b>1. Overview and Installation</b>	<b>1.1</b>
1.1 Overview	1.1
1.2 Installation	1.4
1.3 Networking OE	1.8
1.4 The manual	1.9
1.5 Running the program	1.10
<b>2. Configuration</b>	<b>2.1</b>
2.1 Overview	2.1
2.2 Users	2.3
2.3 Package Links	2.4
2.4 Other Default Settings	2.6
2.5 Sending Emails	2.7
2.6 Meeting Times	2.7
2.7 Document Logos	2.9
2.8 Levels of Risk	2.11
2.9 Emergency Phone Numbers	2.15
2.10 RAMS	2.16
2.11 RAMS – Critical Incident Management	2.19
2.12 RAMS – Docs and guidelines	2.20
2.13 Hazards register	2.21

---

---

2.14	SAP Entries	2.21
2.15	Action Plan Goals	2.22
2.16	Photograph Directories	2.23

### **3. Students**

#### **3.1**

3.1	Overview	3.1
3.2	Importing students from your SMS	3.3
3.3	Basic Information	3.5
3.4	Events this year	3.9
3.5	All events attended	3.11
3.6	Action Plan Goals	3.12
3.7	Caregiver details	3.13
3.8	Medical Details	3.15
3.9	General Notes	3.17
3.10	Sensitive Information	3.18
3.11	Blanket Approvals	3.18

### **4. Leaders, Staff and others**

#### **4.1**

4.1	Overview	4.1
4.2	Importing Staff Members	4.2
4.3	Basic Details	4.3
4.4	Events attended	4.6
4.5	Emergency Details	4.7
4.6	Medical Details	4.7
4.7	Skills	4.8
4.8	Qualifications	4.9



---

## **5. Events**

### **5.1**

5.1	Overview	5.1
5.2	Approval in principle	5.3
5.3	Event Approval	5.6
5.4	Other adults involved	5.11
5.5	RAMS and SAP	5.13
5.6	Attach Students	5.18
5.7	Documents	5.19
5.8	Student Strengths	5.20
5.9	Student Roles	5.22
5.10	Senior leader Evaluation	5.23
5.11	Event report and Evaluation	5.24
5.12	Incidents Log	5.25
5.13	Send Emails	5.29

## **6. The Printing Utility**

### **6.1**

6.1	Overview	6.1
6.2	Lists	6.6
6.3	Calendar	6.6
6.4	Document Design	6.8
6.5	Document Printing	6.18

## **7. Web Links**

### **6.1**

7.1	Overview	7.1
7.2	The Web Links	7.2
7.3	Add or Edit the web links	7.3

## **8. Performing Searches**

### **8.1**

8.1	Overview	8.1
8.2	Performing Searches	8.2

---

<b>9. Other utilities</b>	<b>9.1</b>
9.1 Overview	9.1
9.2 End of Year Process	9.2
9.3 Email your database	9.4
9.4 Emails sent	9.4
9.5 Global permissions	9.6
<b>10. Meetings</b>	<b>10.1</b>
10.1 Overview	10.2
10.2 One day at a time	10.3
10.3 One week at a time	10.9
10.4 One month at a time	10.10
10.5 Alarms	10.11
<b>11. Using the web site</b>	<b>11.1</b>
11.1 Using the Worsfold Software web site	11.1
11.2 Accessing the web site from within the package	11.5
11.3 Installing a downloaded update	11.10

## **Appendix I**

Examples of the official documents

## **Appendix II**

The structure of the worsfold.csv export file

# **Copyright/License Agreement**

## **Worsfold Software Ltd**

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## Conventions used in this manual

Most of the examples used in this manual are from a database of fictitious students. If and when examples are from actual centres and actual students a rectangle has been used to obscure names.

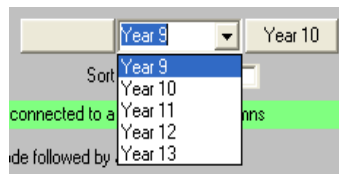
<Enter> means 'Press the Enter key'

'Ctrl' refers to the Control key, which probably has 'Ctrl' on your keyboard.

Alt' refers to the 'Alt' key on your keyboard.

Each chapter begins with an overview of the topics covered therein.

The pages of each chapter are numbered according to the chapter. If you find a topic in the contents or the index in which you are interested then you will find both the chapter number and the page number associated with the topic, e.g. 'The specification of courses 3.12' means that this topic is to be found on page 12 of chapter 3.



These are popup lists, even though they pull down.

### Multiselecting

Frequently you will wish to make multiple selections from lists. The standard way to do this is to hold down the Control key ('Ctrl') while selecting from the list by left-clicking with your mouse.

### The package name

I quickly got tired of typing 'Education Outside The Classroom' and found it convenient to refer to the package simply as EOTC.

### Spurious examples

I also tired of trying to be 100% serious when testing various aspects of the package by entering examples. Many of those seen in this manual are not particularly serious.

**Do we have to fill in EVERYTHING?**

No. The package is intended to allow you to enter everything you might wish to relating to events, students and adults. However, there is no compulsion on the part of the package for you to enter anything but the main event title or person's name. You should enter only that information which you deem necessary for your purposes – and leave the rest blank.

**You don't click 'Save' to record data**

Every time you LEAVE an area where you've entered some information the new data is automatically saved back to the database. There are no 'Click to save changes' buttons.

**Some names are 'whited out'**

That's because sometimes the names are those of real people whose identities are thus protected.

## Thanks

This package has been written primarily to get Arthur Sutherland off my back.

Arthur was responsible, several years ago, for persuading me to write the Star Management package. This resulted in requests from schools for two further packages – the Gateway Management package and 'Future Indicative' – a Careers management package – all of which are used widely in New Zealand schools.

For some time Arthur has been on at me to write a package to manage Education Outside The Classroom and this package is the result of those requests.

His suggestions and advice have contributed substantially to the design of the package. I've also received help along the way from Eric Schusser (of Dunstan High School) and Guy Sutherland (of Roncalli College).

My grateful thanks are due to these people without whom this package would not have been written.



# ***Chapter 1***

## **Overview and Installation**

What is covered in this chapter?	Page
1.1 Overview	1.1
1.2 Installation	1.4
1.3 Networking OE	1.8
1.4 The manual	1.9
1.5 Running the program	1.10

### **1.1 Overview**

This package has been written using Microsoft's Visual Basic 2008 (VB9) and employs an Access database for each year of use for holding all information concerning current students. This database is named eg eotc2011.mdb. This database is not included in the installation package. If the database is not found then it is created by copying a standard empty oe database included with the package. This ensures that subsequent installations of the package will never overwrite the current database and that, as a result, your data is safe when installing updates.

The package uses Microsoft's Dot Net (.net) systems, along with a few components from other suppliers. In the past this has required the separate installation of 'system files'. This process is now obsolete as the necessary system files are now installed, along with the package, in the operating directory – a much better system.

Its purpose is to make it possible for schools to manage their EOTC information.

The basic processes include :



1. The entry of details relating to a new EOTC event – through
  - Initial 'Approval in Principle'
  - Formal Event Approval
  - Recording a range of further details relating to the event
  - The attachment of students (and helpers) to the event
  - The printing of various documents relating to the event
  - The Recording of results / evaluations / student strengths and roles
  - The recording of incidents
2. The maintenance of the current year's database of students with the ability to
  - Keep a track of their basic data
  - Their Swimming Ability
  - Photographs
  - Events attended
  - Action Plan Goals
  - Blanket Approvals
3. The maintenance of a database of staff members, leaders, contractors and organisations with the ability to
  - Maintain their basic details
  - Their skills and qualifications
  - Their event involvements
4. A configuration process, which covers
  - Registration of users of the software
  - Links to MUSAC / Kamar / PCSchool / IES
  - The sending of emails
  - The setting of meeting Times

- Document Logos
  - Levels of Risk
  - RAMS and SAP entries
  - Emergency Phone Numbers
  - A Hazard register
  - Basic Action Plan Goals
5. A Printing utility which allows you to
- Print lists
  - Print event calendars
  - Design your own / modify existing documents (The package comes with over thirty pre-designed documents based on MOE guidelines.)
  - Print official and unofficial (your own) documents.
6. A web links feature which enables you to quickly access a range of pre-connected websites relating to weather, Road Watch, MOE MET services and others. You can also attach web sites of your own choice.
7. A Search Utility which enables you to find e.g.
- Those students who have attended more than 5 canoeing events
  - Those students who have attended more than 60 hours of EOTC events
  - Those students who have attended the Sir Edmund Hilary Outdoor Events Centre.
8. Various Other utilities e.g. an End-of-year process to create the new year's database.
9. A Meetings facility which allows you to record details of meetings with students / staff members and the like.
-

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## 1.2 Installation

EOTC is supplied on a CD or can be downloaded from the Worsfold software website. A registration file will be emailed at the time of sending the CD.

If the CD does not autoboot (set up automatically after insertion into your CD drive) then use Windows Explorer to find the CD and run the program EOTCinstall.exe. One way or another, you'll arrive at the opening screen, shown below.

There are but three options on the screen of the installation CD, shown below.

The first enables you to proceed to the installation of the package.

The second opens the package manual (which can be found on the CD – named eotc.pdf)



And the third allows you to exit.

### 1. The installation process

This process will install the package which consists of a program and several support files.

#### Networking

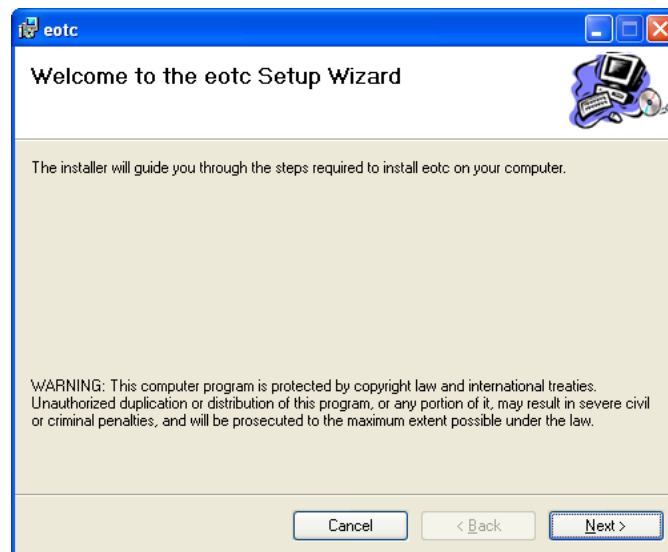
Please refer to the following section 1.3

#### Installation

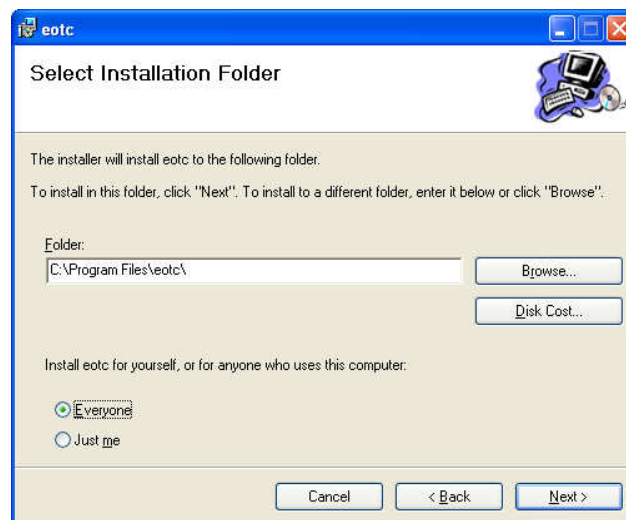
The first time you run the installation process you will be greeted with the screen shown below.

Subsequent installations (of updates) will begin with a slightly different screen. This process is described later.

If you have downloaded the package from the Worsfold Software web site ([www.worsfoldsoftware.co.nz](http://www.worsfoldsoftware.co.nz)) then you will have a zip file from which two files (the package .msi file and setup.exe) can be extracted to a directory of your choice, from whence you can run the setup program. This will bring you in to the installation process at this point.



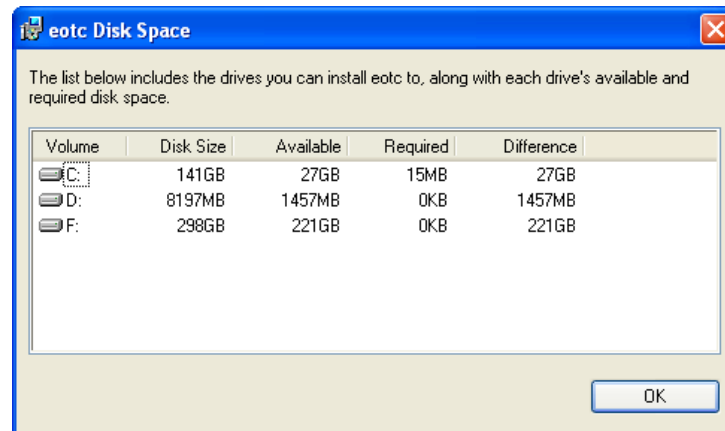
Click on the Next button and you will be asked to confirm the destination, where you wish to have the package installed.



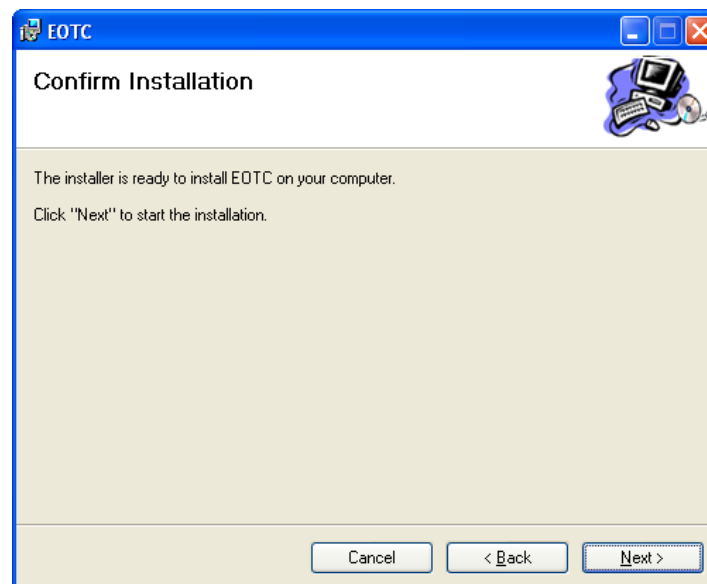
By default, the process will attempt to create a '\eotc' subdirectory under 'Program Files' as shown above. You can browse to select a different location if you prefer.

**Please note that, if you are installing on to a 64-bit computer, then you should install into the \Program files x86 directory.**

There is a 'Disk Cost' button on this screen which reveals the following, or something similar...depending on your computer. You can use this to determine how much space the program will require. The screen below indicates that the package will require 34MB – and most of this is taken up by the included system files which get installed along with the program. Once your package is up and running you will also have a database or three, each of which will be several megabytes in size.

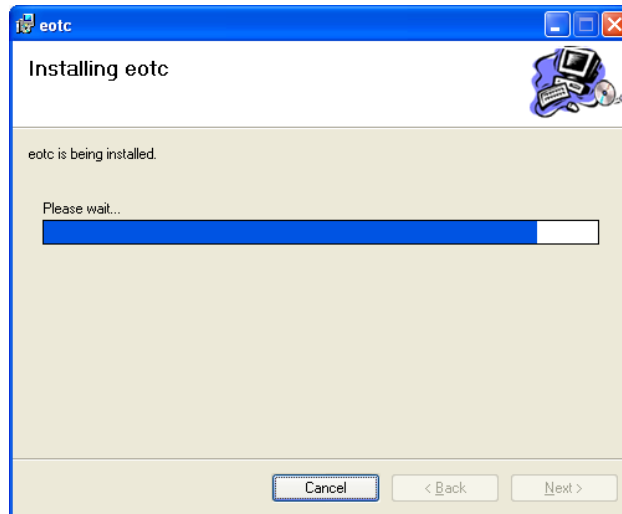


Next comes the confirmation screen, which really doesn't tell you too much :

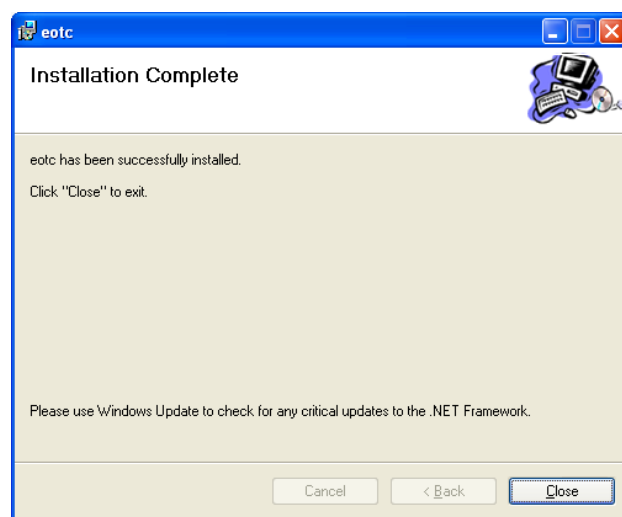


... followed by the 'Progress' screen ...which can, depending on your computer, take quite some time, and can even appear to freeze for a few minutes!

It is, I believe, accessing the internet to download the required components of the Dot Net Framework v3.5. If your computer already has these installed then progress should be relatively fast.

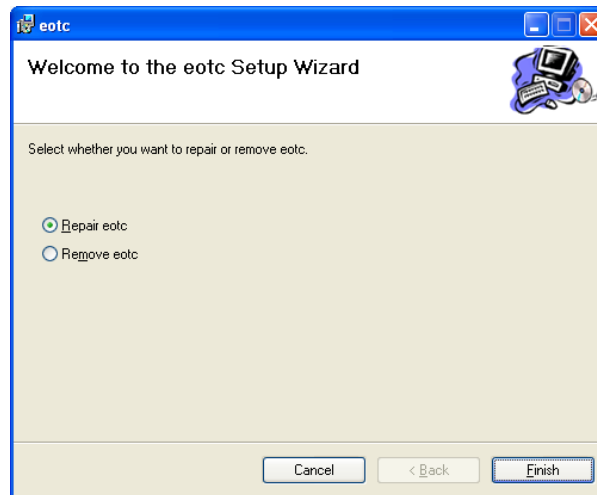


... arriving finally at the 'Process Complete' screen :



If you attempt to install the package a second time on to a computer which has

already had the package installed then your welcome screen will appear as :



You will have the opportunity to either re-install the components (Repair) or to uninstall the package.

### 1.3 Networking EOTC

Due to increased security 'enhancements' made to their operating system(s) by Microsoft, networking Education Outside the Classroom is not quite the simple process which it had been anticipated that it would be. It was intended that you simply install the package on a file server and access it, as usual, from each terminal. The beauty of the .net framework is that system files need no longer be installed on each and every terminal.

However, Microsoft, in its wisdom, has greatly increased the security required to access the program on the fileserver from a terminal.

Make sure that you have installed the latest Service Pack for the Dot Net Framework. The package uses aspects of version 3.5

You will need to provide users with full rights to the \eotc folder on the file server.

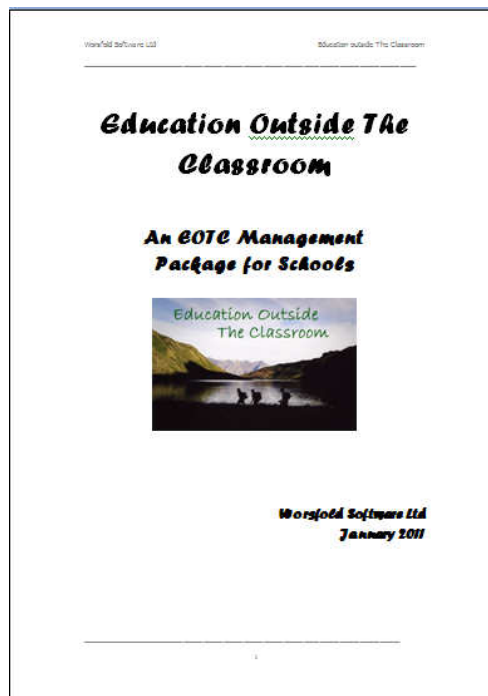
Every school has its own particular way of managing their network but the above does seem to be a reasonably generic approach.

The alternative is to install the package on to every terminal – the 'Distributed Client' approach - and to have them point to a central directory on the file server (where the package is also installed) where the database resides – along with the registration file, Kamar export file etc.

This process works well and the dialogue to link to the fileserver, where the database(s) reside, forms part of the first-entry process, described below.

## 1.4 The Manual

The Education Outside the Classroom manual is included on the CD in the form of a .pdf file. Clicking on the third button will cause the manual to be displayed on the screen ...



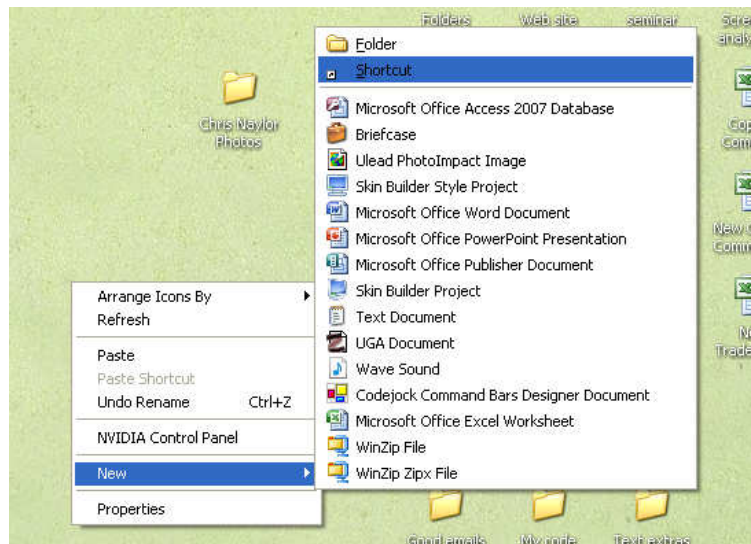
... from whence you can view it or print it or save it to a destination of your own choice.



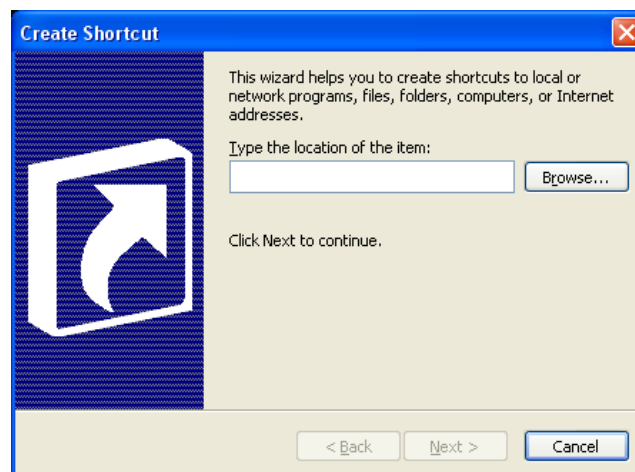
## 1.5 Running the Program

Education Outside the Classroom runs via an application file (or program) called eotc.exe and this is found in your \eotc directory.

You will probably wish to create a shortcut to this program and to have this shortcut on your desktop. To do this, right click with your mouse on the desk top....

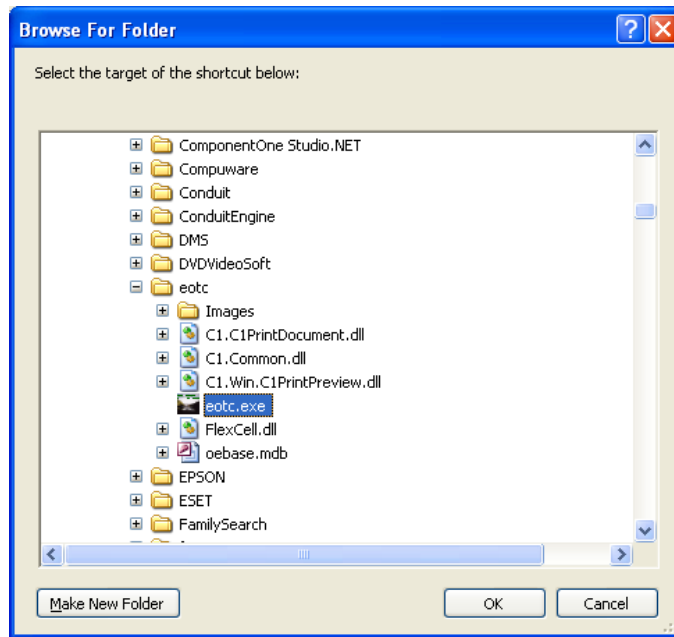


Select 'New' followed by 'Shortcut', as shown above. The following dialogue (or one like it, depending on the version of Windows which you are running) will appear. Either 'Browse' to identify the location of fi.exe or type it in if you know it. Then click 'Next'

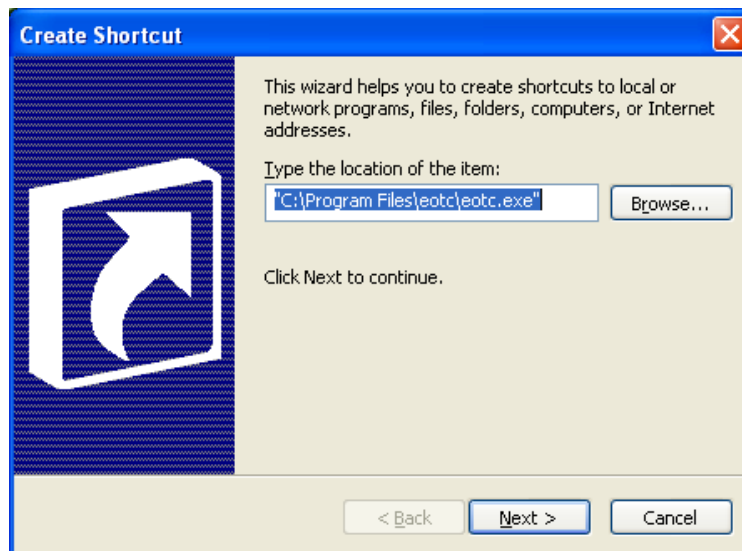


The second step will appear via which you can browse to indicate the location of the

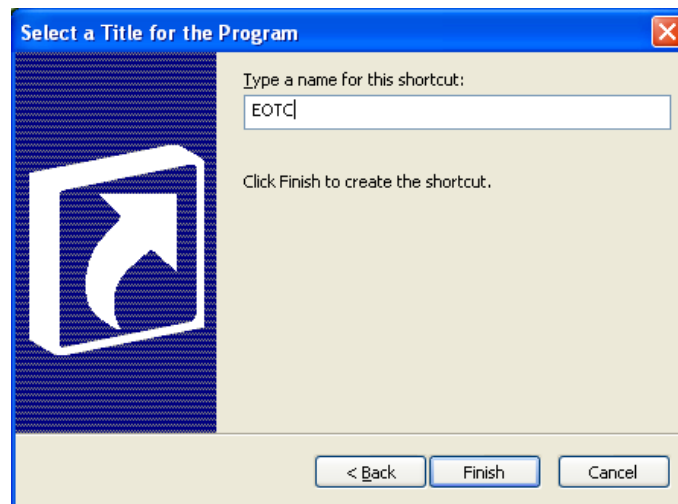
program : eotc.exe :



Click OK and you will return to the second screen ...



... with the program now identified. Click 'Next' to proceed to the 'Shortcut Name' screen, and replace the somewhat obscure 'eotc.exe' with the words 'EOTC' as shown below.

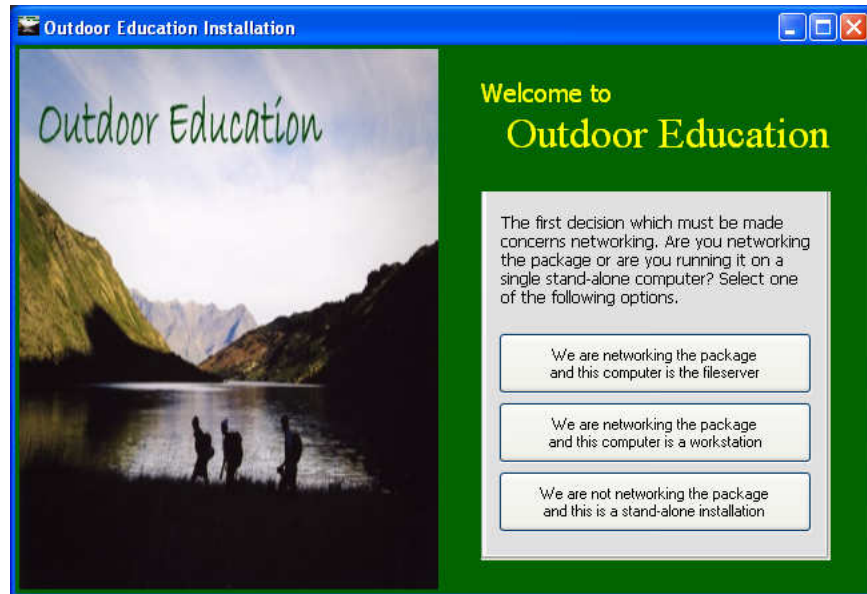


Click 'Finish' to do so and your shortcut will appear :



Now, to access the program you simply have to double click on the shortcut.

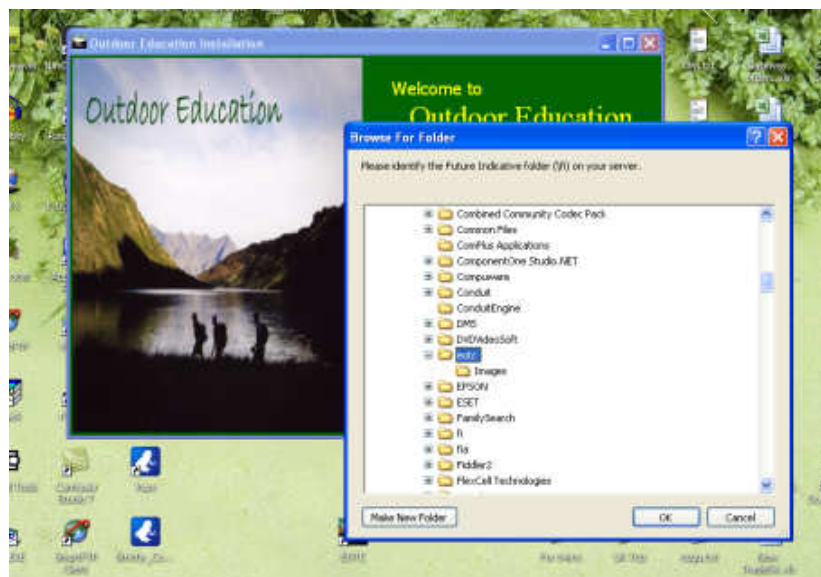
The first time you run the main program on either the file server or a terminal or a standalone machine) you will be greeted with the following screen.



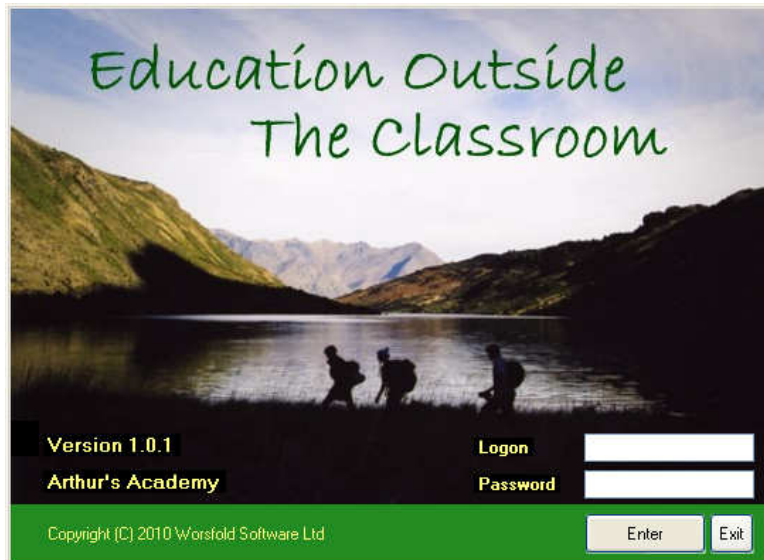
The package needs to know where the database is.

If you are on a file server or on a standalone machine then its right there in the same directory and clicking the first or third of the buttons will tell you so.

If however, you are on a terminal then click the second button and you will, by clicking 'Proceed' on the screen shown below, be asked to identify the path to the fileserver where EOTC is installed and where the database will live.



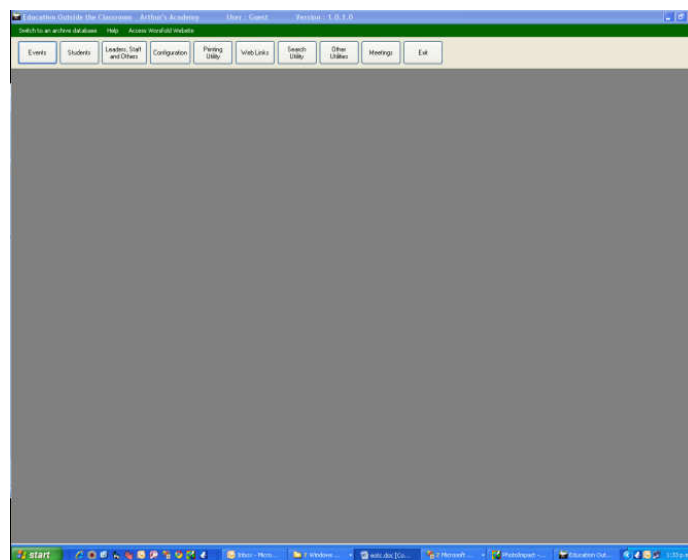
Once you've done that, you will proceed directly to the opening ('Splash') screen for the package.



Initially, you should enter using the entry code : **guest** and password : **wors**

Later on, you will set your own entry or entries up and may wish to change the password for 'guest' so that others cannot enter uninvited.

Once you have successfully logged on you will arrive at the main package screen, from whence all other processes occur.



---

## Licensing

The program is licensed to a school and this is recognised by a small file named 'eotcreg.lic'. This is a registration file which contains your school name. It is emailed to you at the time when your order for the package is mailed to you.

If you have NOT copied your license file into your \eotc directory then the program will run perfectly but you will be unable to send printouts to your printer. Your 'school name' will be 'Worsfold Demonstration'. Any data you enter will be held perfectly safely in the database and will NOT be lost when you DO put your license file into place.

The warning which you will receive to alert you is shown below.



The email which is sent out with the license file is reproduced below.

### "OETC order confirmation and registration

Greetings from Worsfold Software Ltd

You have recently ordered the 'Education Outside The Classroom' package and this has been put in the post to you.

Please find attached a small registration file. This file is not intended to be opened. It is simply an encrypted registration file.

Once you have installed the package, copy this file to your new \eotc directory. This will indicate to the program that the package has been registered for your school for e.g. 2011, or whichever year you have purchased the package.

If there is no file attached then please contact me, either by email at the above address, or by phone on 03 449 2094.

If you have any questions or comments or suggestions concerning the package please do not hesitate to contact Worsfold Software.

---

Please note that, as described in the email, the small file attachment is NOT intended to be 'opened', but simply copied or 'saved as' into your \eotc directory. If, in spite of these instructions, you did attempt to open the file, and immediately emailed me to let me know that it would not open, then you are not alone!

**Subsequent licensing**

After your first year of use of the package, an invoice will be sent to you for the annual license fee (currently \$175.00 + GST for 2011). License invoices are not posted until April each year.

This concludes the installation process. If you have any questions please either :

call Worsfold Software Ph 03 449 2094

or e-mail to [randcbutler@inspire.net.nz](mailto:randcbutler@inspire.net.nz)

# ***Chapter 2***

## **Configuration**

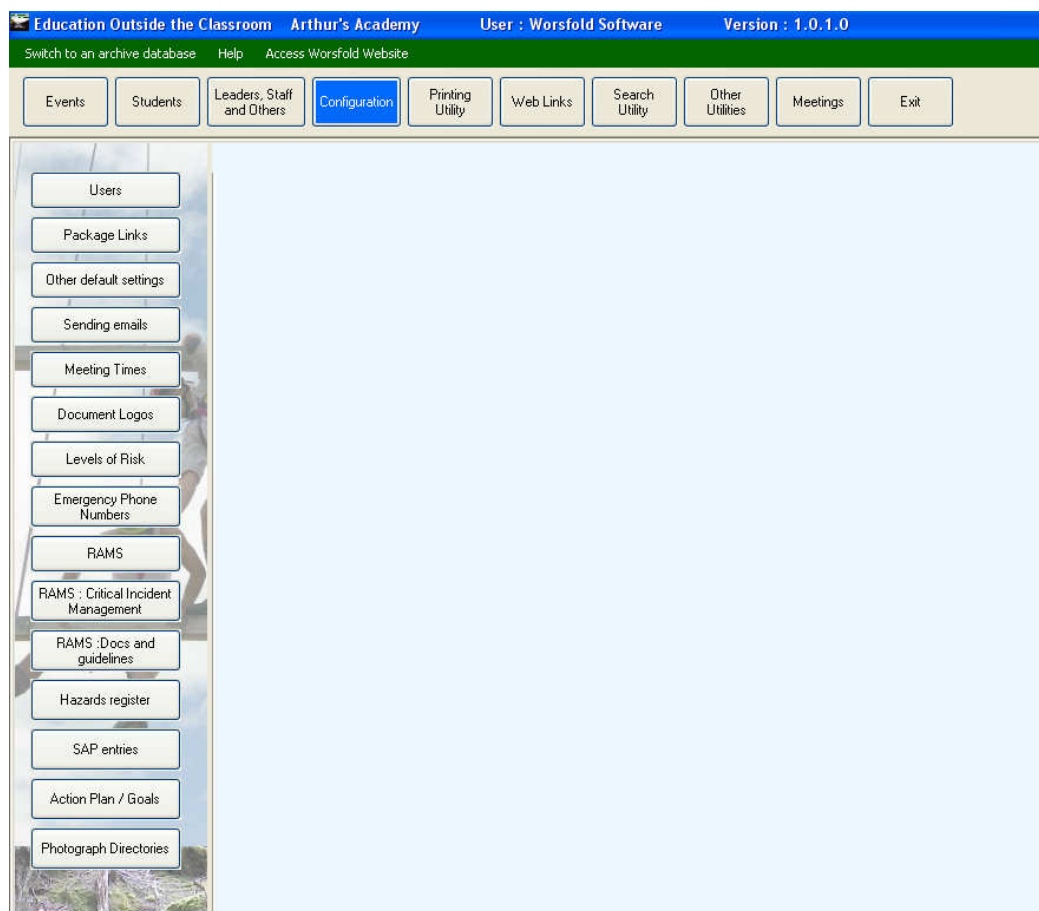
What's in this chapter?	Page
2.1 Overview	2.1
2.2 Users	2.3
2.3 Package Links	2.4
2.4 Other Default Settings	2.6
2.5 Sending Emails	2.7
2.6 Meeting Times	2.7
2.7 Document Logos	2.9
2.8 Levels of Risk	2.11
2.9 Emergency Phone Numbers	2.15
2.10 RAMS	2.16
2.11 RAMS – Critical Incident Management	2.19
2.12 RAMS – Docs and guidelines	2.20
2.13 Hazards register	2.21
2.14 SAP Entries	2.21
2.15 Action Plan Goals	2.22
2.16 Photograph Directories	2.23



## 2.1 Overview

Before you can really begin to use the package you must let it know about several settings which affect the way in which it operates. Each of these is dealt with, in turn, below.

Access the configuration screen by clicking on the fourth button in the top row. The main screen, with its list of buttons, is shown below. We'll deal with each of the button in the order shown down the left hand side.



## 2.2 Users

The first thing which you should do is to give yourself (and any others who will be using the package) an entry code and a password which they will use to access the package. You also need to provide a 'name' by which they will be referred to within the package.

Click on the first configuration button, labelled 'Users' and the following screen will appear.

The screenshot shows a web interface titled "People given rights to use this package". On the left is a scrollable list of users with a header "User name" and one entry "Guest". On the right are three input fields labeled "User name", "Entry code", and "Password". Below these is a checkbox labeled "Can adjust the web links". At the bottom are two buttons: "Add a new user" and "Remove the selected user".

On the left hand side of the screen is a list of existing users (and there is only one initially).

To add a new user, click on the first button below the list and add the three essential pieces of information concerning them :

a) User Name

The user name is the name by which the user will be referred to within the program.

---

b) Entry Code

This is the code which they will type in to enter the package. It is frequently the family name of the person concerned.

c) Password

This is the password which they will use to confirm that they are the user attempting to enter the package. The password may be up to ten characters long and should contain both characters and digits – to make guessing somewhat more difficult should someone else try to enter the package using your entry code.

Each user can have rights within the package and these are listed below, on the right hand side of the screen. The rights are:

a) The ability to adjust web links.

One of the package features is the inclusion of a web browser with buttons which link to specified websites. If a user is given this right then he or she will be able to make new connections or adjust existing ones.

At the time of writing there is only one user-right. More may well be added later as requests for restrictions on users are received.

## 2.3 Package Links

This package is able to retrieve information from MUSAC, Kamar, PCSchool and IES School Management Systems. In order to do so, you must inform the package of the connection information necessary to enable the information to be accessed.

The choice is made via the three options shown below.

**Is your school using one of these systems?**

If so then information stored there will be available to this package

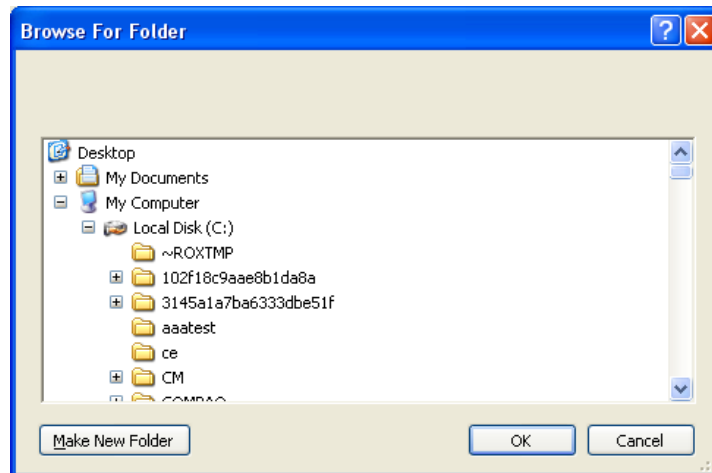
☒ We are using MUSAC

☐ We are using Kamar, PCSchool or IES

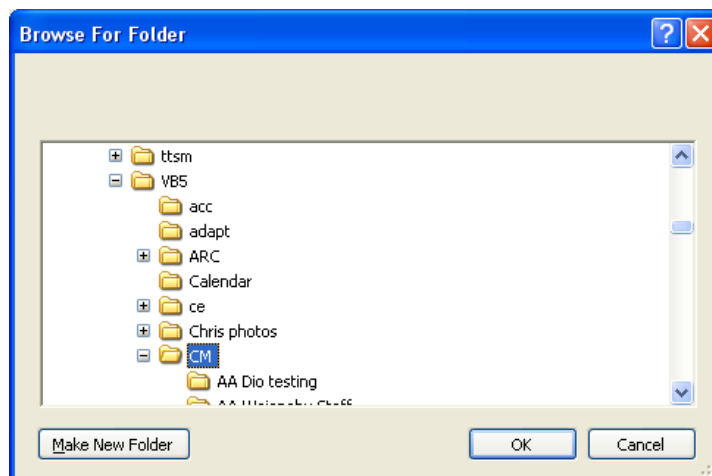
☐ We are using neither of these

If your school is using MUSAC's Classroom Manager (and Student Manager too of course) then you will not have to type in students' names as these will be retrieved from that package. Quite a lot of other student information is also retrieved directly from the MUSAC databases.

In this case click in the text box as if you were going to type in the path where the MUSAC databases are stored. A browse dialogue will appear...



... via which you can browse to identify the \cm directory used by MUSAC.



Once you have found it, click OK and you will be returned to the configuration screen with your path recorded.

---

Kamar also provides the ability to link to EOTC. Kamar provides an export facility which generates a file of student information. The title of this file is 'worsfold.csv' and you should generate it and copy to your \eotc directory. If this file is found (and you have indicated on the screen above that you are linking to Kamar – by clicking in the second option button on the left) then, when you go to attach students then those found in the Kamar export file will be listed for you.

How do you create the worsfold.csv export in Kamar? The following instructions were received from Kamar : (N.B. In order to be able to generate this export the Kamar user must have certain rights within the package. Please consult with your Kamar expert if necessary)

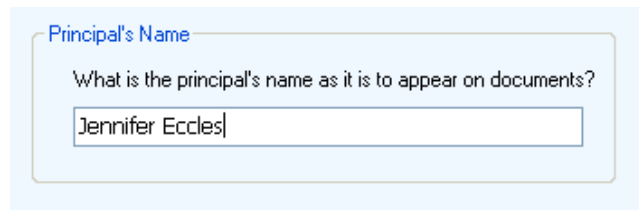
- a) From the main menu in Kamar select 'Printing'.
- b) Select 'External programs'.
- c) Select 'Export to Worsfold'
- d) Select 'Search for Students'
- e) Select 'Find'
- f) Select 'Continue'
- g) Save the file to your \eotc directory

This will create the file and you then have to copy it into the directory relating to the package(s) with which you wish to use it – in this case the \eotc directory for EOTC. To signal that you have done this, click on the second link option 'We are using Kamar'.

If your school is using none of the possible vendor links then indicate this by clicking on the third option – 'using neither'. You will, in this case, be able to enter student details manually.

## 2.4 Other Default Settings

At this stage there is but one other setting – the name of the principal. The name entered here will subsequently appear on some of the standard documents generated by the package.



Principal's Name

What is the principal's name as it is to appear on documents?

Jennifer Eccles

## 2.5 Sending Emails

EOTC includes the ability to allow you to send individual or group emails to students, staff and caregivers directly from within the package. In some cases this will be done via your computer's email program (e.g. Outlook) and in other the email can be sent directly without going through your email program.

In order for the second process to occur you must specify two settings, as shown below. The necessary information is shown on the screen itself.



**Sending Emails**

Before you can send emails from within this program you must specify two pieces of information relating to your school's email system.

1. The email address FROM which you are sending the email

randcbutler@paradise.net.nz

2. The server address of your email provider.  
This is NOT an email address, but will appear as (for example) smtp.paradise.net.nz  
Please consult with your IT person if you are not sure of this.

smtp.paradise.net.nz

## 2.6 Meeting Times

Each user of the package can arrange and manage their own schedule of meetings with either students or staff members. This is done via one of the main package buttons along the top of the screen.

In order to do this the available meeting times should be entered on the screen,

shown below. By default, times are set up for every fifteen minutes from 8am through to 4.45pm Monday to Friday. Please note that the SAME set of times apply to ALL users of the package, even though a particular user might use a restricted set of times.

Please include the am/pm indication as these are recorded during the saving of appointment information and used to identify the particular timeslot involved when retrieving information.

Specify the daily times at which meetings can be held. Use right-click to insert or delete a blank entry. Preferred initial schedule display Day ☒ Week ☐ Month ☐ Appointment alarm Active ☐ Minutes in advance : 15

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
8.00am	8.00am	8.00am	8.00am	8.00am	3.45pm	
8.15am	8.15am	8.15am	8.15am	8.15am		
8.30am	8.30am	8.30am	8.30am	8.30am		
8.45am	8.45am	8.45am	8.45am	8.45am		
9.00am	9.00am	9.00am	9.00am	9.00am		
9.15am	9.15am	9.15am	9.15am	9.15am		
9.30am	9.30am	9.30am	9.30am	9.30am		
9.45am	9.45am	9.45am	9.45am	9.45am		
10.00am	10.00am	10.00am	10.00am	10.00am		
10.15am	10.15am	10.15am	10.15am	10.15am		
10.30am	10.30am	10.30am	10.30am	10.30am		
10.45am	10.45am	10.45am	10.45am	10.45am		
11.00am	11.00am	11.00am	11.00am	11.00am		
11.15am	11.15am	11.15am	11.15am	11.15am		
11.30am	11.30am	11.30am	11.30am	11.30am		
11.45am	11.45am	11.45am	11.45am	11.45am		
12.00pm	12.00pm	12.00pm	12.00pm	12.00pm		
12.15pm	12.15pm	12.15pm	12.15pm	12.15pm		
12.30pm	12.30pm	12.30pm	12.30pm	12.30pm		

The schedule screen has three sub-screens via each of which you can view a different display of appointments. The three appearances are :

- One day at a time
- One week at a time
- One month at a time

Using the three choices at the top of the screen you can select which of the three you wish to use as your default appearance each time you click on the 'schedule' button.

---

You can also elect to turn a meeting alert system on or off. It is turned ON by ticking the check box labelled 'Appointment alarm Active'. You should also set the number of minutes in advance by which you wish to be alerted to imminent meetings.

## 2.7 Document Logos

There are two sets of documents available within the package.

- a) The official documents – based on the MOE Guideline documents.
- b) The 'unofficial' ones – which you design yourself.

Each set of documents may have its own logo – one small in for the top left hand corner of each official document and a second one for your own documents.

The logos are specified via the following two logo screens which are accessed via the two tabs at the top of each screen. Your logos should be .jpg files and should be in your \eotc directory.

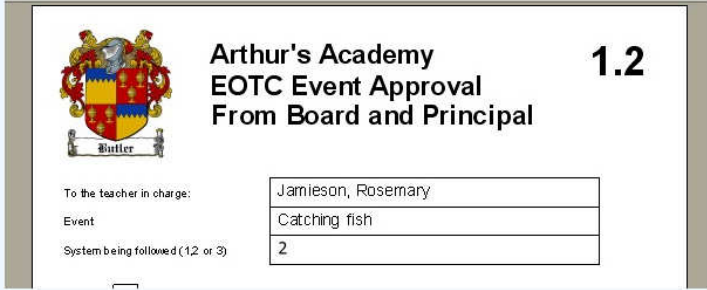
Two sample logos are included with the package and you should change these to your own preferred logo prior to printing documents. The sample for the official documents is the Butler family crest and that for unofficial documents is one for 'Arthur's Outdoor Academy of Excellence.'



Official Documents logo   Unofficial Documents Logo

**Document Logo for Official Documents**

Your own document logo will be printed in the top left hand corner of each of the standard documents - as shown below. This is a relatively small logo which will fit into the top left hand corner of the document as shown in the illustration below.



In order for this to happen you must :


- Have your logo saved as a .jpg file in your \eotc directory
- Select your logo via the 'Select' button below.
- Adjust the shape of your logo to your requirements (using the four reshape buttons)

Please note that the logo will be resized automatically to fit on the document.

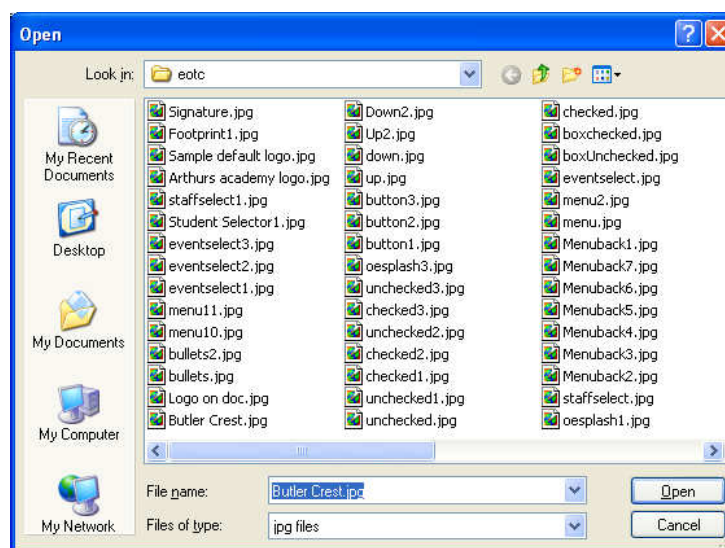
Select your Logo

Reshape buttons:

< > < >

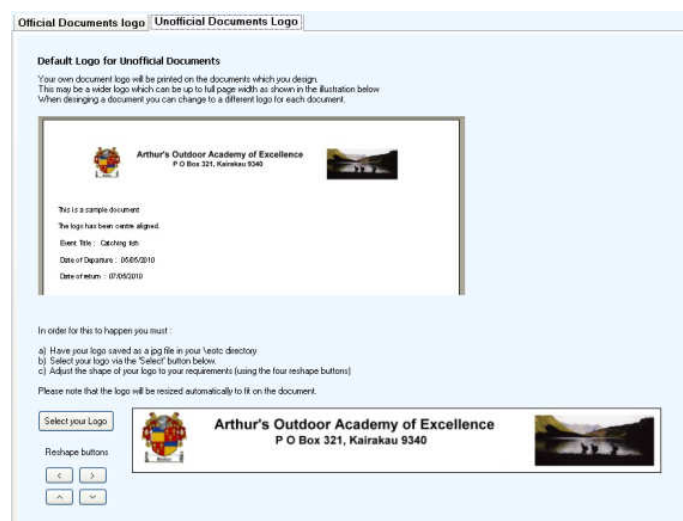


An example of the final appearance of your logo on a document is shown at the top of the screen. Click on the button labelled 'Select your logo' and a file selection dialogue will appear. As shown below.



Once your logo is displayed at the bottom of the screen you may use the four small arrow buttons to adjust its size and shape.

Click on the second tab at the top of the logo screen to switch to the screen via which you can, similarly, select and shape your chosen logo for unofficial documents. The screen in question is also identical to that shown above – with the exception that you may widen your logo to almost full document width – as shown below.



## 2.8 Levels of Risk

Each of your EOTC events should be associated with a particular 'level of risk'.

The **Ministry of Education** suggests eight levels, as shown in the screen below.

**Levels of Risk**

There are various ways in which EOTC events can be categorised to indicate the level of risk involved.

Our school is using

☒ The Ministry of Education Guidelines set
 ☐ The Alternative set
 ☐ Our own set

**Ministry EOTC Guidelines****Alternative set****Our own set (Editable)****Attached documents**

No.	Activity type	Examples	Approval	Parental Consent	Risk management Planning
1	On site - in the school grounds - Low risk environments	Sports day, painting murals, horticulture	None required	None required	Usual lesson planning
2	On site - in the school grounds - Higher risk environments	school pool or climbing wall	School decision	Blanket consent	Usual lesson planning or generic RAMS or SAP*
3	Off site - Local community within school hours - Low risk environments	museum, art gallery, sports and recreation events	Senior staff or EOTC Coordinator	None or Blanket consent - School decision	Generic RAMS or SAP*
4	Off site - Local community within school hours - Higher risk environments	Acquatic (river / beach), cross country running	Senior staff or EOTC Coordinator	Blanket or Separate consent - School decision	Generic RAMS or SAP*
5	Off site - Day trips may extend out of school hours - Low risk environments	farm visit, day hike, city visit, ferry trip, swimming in pools	Senior staff or EOTC Coordinator	None or Blanket consent - School decision	Generic RAMS or SAP*
6	Off site - Day trips may extend out of school hours - Higher risk environments	skiing, waka ama, rock climbing, fields trips with chemicals or heavy machinery	Principal or EOTC Coordinator	Separate consent and risk disclosure	Specific RAMS or SAP*
7	Off site - Residential multi-day trips further afield - Low risk environments	trip to another region, sports tournaments, visits to historic sites	Principal or EOTC Coordinator	Separate consent	Specific RAMS or SAP*
8	Off site - Residential multi-day trips further afield - Higher risk environments	overseas trip, field trips to natural water/bush/alpine environments, outdoor pursuit journeys	Principal and/or Board	Separate consent and risk disclosure	Specific RAMS or SAP*

\* Or other appropriate form - examples are available in the Ministry of Education EOTC Guidelines document.

N.B. All events require current health information

N.B. It is strongly recommended that you refer to the Ministry of Education EOTC Guidelines document for full details of these risk levels.

Associated with each risk level are

- The activity type
- Examples
- Approvals required
- Parental Assent required
- Risk Management Planning

Each of these is specified in the columns as shown in the illustration. The entries for the MOE guidelines are set and may not be edited. (Any changes you make will not be saved)

A second alternative (**The Alternate Set**) is also available – via the second tab at the top of the table. Click on this and you will be presented with the alternate set, shown below.

Ministry EOTC Guidelines					
Alternative set					
Our own set (Editable)					
Attached documents					
No.	Activity type	Examples	Approval	Parental Consent	Risk management Planning
1	On site - Low risk environments	Class activities	None required	None required	Usual lesson planning
2	Off site occurring within one day - Low risk environments	History trips, Theatre, farm visits	Curriculum Committee (including Principal)	Permanent approval	Usual lesson planning or generic RAMS or SAP*
3	Off site occurring within one day - Higher risk environments	Skiing, agricultural trips involving chemicals	EOTC Coordinator or DP	Event-specific approval	Generic RAMS or SAP*
4	Sport - indoor and outdoor	Night sports events, Wednesday sport, sports exchanges	Sports Committee/Coordinator	Permanent approval	Generic RAMS or SAP*
5	Recreational swimming	Surfing	EOTC Coordinator or DP	Event-specific approval	Generic RAMS or SAP*
6	Overnights	Camps, sports exchanges, field trips	EOTC Coordinator and/or Sports Coordinator and Principal	Event-specific approval	Specific RAMS or SAP*
7	Outdoor Education	Kayaking, tramping	Curriculum Committee	Event-specific approval	Specific RAMS or SAP*
8	Overseas	Sports trips, Class trips	Principal (including Principal)	Event-specific approval	Specific RAMS or SAP*

This set is also 'fixed' and may not be altered.

If you do not wish to use either of these two sets of risk levels then you may specify **your own set of risk levels** – via the third tab labelled 'Our own set (Editable)'.

In the example below a school has decided to use just four levels of risk.

Ministry EOTC Guidelines					
Alternative set					
Our own set (Editable)					
Attached documents					
No.	Activity type	Examples	Approval	Parental Consent	Risk management Planning
1	Local stuff	Inter-house cricket	No	No	None
2	Around town	Inter-college cricket	No	No	Generic RAMS or SAP*
3	Around the country	Exchange college cricket	Coordinator	Yes	Generic RAMS or SAP*
4	Overseas	Australian school cricket	Principal	Yes	Generic RAMS or SAP*
5					
6					
7					
8					

### Attached Documents

The package has some forty three pre-designed documents. Some of these will be required regardless of the level of risk while others may only be required for higher risk level events.

The fourth tab on the current screen allows you to decide which documents are automatically required for each particular level of risk. The screen via which these are specified is shown below.

**Levels of Risk**

There are various ways in which EOTC events can be categorised to indicate the level of risk involved.

Our school is using

☒ The Ministry of Education Guidelines set
 ☐ The Alternative set
 ☐ Our own set

**Ministry EOTC Guidelines**
**Alternative set**
**Our own set (Editable)**
**Attached documents**

Use this screen to specify which of the MOE EOTC documents are required for each of the risk levels. Once you have done this then the specified documents will be available via the 'Documents' button for each event. Initially ALL documents will be attached. You should unattach unrequired documents.

Restore the default selections

**Select risk level**

1 On site - in the school grounds - Low risk environments
2 On site - in the school grounds - Higher risk environments
3 Off site - Local community within school hours - Low risk environments
4 Off site - Local community within school hours - Higher risk environments
5 Off site - Day trips may extend out of school hours - Low risk environments
6 Off site - Day trips may extend out of school hours - Higher risk environments
7 Off site - Residential multi-day trips further afield - Low risk environments
8 Off site - Residential multi-day trips further afield - Higher risk environments

**Select required documents**

Document	View	Attached
01.0 Approval in Principle	View	<input checked="" type="checkbox"/>
01.1 Event Proposal	View	<input type="checkbox"/>
02.0 Event Approval	View	<input checked="" type="checkbox"/>
03.0 Event Planning Checklist	View	<input type="checkbox"/>
04.0 Parents Information	View	<input checked="" type="checkbox"/>
05.0 Blanket Consent	View	<input type="checkbox"/>
05.1 Blanket Consent	View	<input type="checkbox"/>
05.2 Blanket Consent	View	<input checked="" type="checkbox"/>
06.0 Parental Consent	View	<input type="checkbox"/>
07.0 Health Profile (Student)	View	<input type="checkbox"/>
08.0 Medications Administered	View	<input type="checkbox"/>
09.0 Health Care Plan	View	<input type="checkbox"/>
10.0 Aquatic Consents	View	<input type="checkbox"/>
11.0 Student Contract	View	<input type="checkbox"/>

In the example shown the documents for Level 5 are being specified and several documents have been omitted.

The purpose of this configuration step is to pre-determine which documents will be offered for printing via a particular event's document printing screen. If you've only ticked half of the documents at a particular level then, when you come to print documents for an event at that particular level of risk, only half of the document buttons will be visible.

A centre column in the documents connection table has entries labelled 'View'. If you click any one of these you will get a preview of an example of what the document looks like.

Decide on your preferred set using the three option buttons at the top of the screen and then use the final tab to specify the documents for each of the levels. Default settings come with the package and you may return to these by clicking the button labelled 'Restore the default selections'.

## 2.9 Emergency Phone Numbers

One of the official documents provides a list of a range of emergency phone numbers relevant to your school. These are entered via the configuration screen shown below.

**Emergency Phone Numbers**

Phone numbers entered here will be included in Document 21 - Emergency Phone Numbers

Emergency Contact	Name	Phone(s)
Emergency Services		111
Principal	Jennifer Eccles	School: 03 456 7890 Home: 03 456 0018 Mobile: 021 345 6789
Board of trustees chairperson	William Bunter	Work: 03 456 1234 Home: Mobile: 025 135 7901
School media spokesperson		School: Home: Mobile:
Nearest doctor - medical centre		
Nearest hospital - emergency department		
Nearest police station		
Community constable		
Department of Conservation	Jim	03456789
Mountain radio service		
Nearest fire station		
Regional council		
National poisons centre		
Camp manager		
Coast guard		
Civil Defence		

## 2.10 RAMS

Some schools prefer to use a Risk Analysis and Management System (RAMS) while others prefer to use a Safety Action Plan (SAP). This package supports the use of both and you must use the configuration items related to these to set up your entries under the various headings. The package does, of course, come with a set of default entries.

On first entry to the RAMS screen it will appear as follows.

**Risk Analysis and Management System**

Use this screen to list all of the risk factors and possible reduction strategies which can apply to any event. Subsequently you will be able to select those which apply to each particular event.

You may set up RAMS relating to People, Equipment, Environment, Transport and your own further specific sets (e.g. Snow and Ice RAMS). Dealing firstly with the People, Equipment, Environment and Transport options :

**Causal factors**

- Lack of participant knowledge
- Lack of staff/leader training
- Lack of adequate briefing
- Inappropriate programming or sequencing
- Failure to check site with pre visit
- Failure to check equipment
- Inadequate intervention
- Stupidity on site
- Failure to disclose risks
- Accident
- Lack on risk management skills, knowledge and experience
- Participants not involved in risk analysis
- No First Aid, rescue or loss plans
- Inadequate supervision
- Inadequate or inappropriate ratios
- Incidents with passers by, other users
- Inappropriate language/behaviour
- Pre-existing medical condition
- Participants leaving site / becoming lost
- Lack of awareness of risks
- Inappropriate hydration/nutrition
- Fatigue/stress
- Lack of outdoor skills, knowledge and experience

**Factor and strategies**

Select a factor from the list on the left to edit it or its strategies, or add a new factor using the button below.

Factor:

Strategies

- Brief participants re risks and hazards
- Brief participants re safe practices
- Brief participants re gear and equipment use
- Brief participants re personal clothing/equipment required
- Brief participants re location boundaries
- Brief participants re expectations and rules
- Brief participants re route

Strategy

**Reorder the factor list**

Use the up and down buttons to move selected entry up or down the list on the left

In the above illustration the People RAMS have been selected and, from the list of Causal factors, 'Lack of Adequate Briefing' has been selected. The right hand side of the screen shows the strategies designed to combat the selected risk.

You can

- a) Add a new causal factor.
- b) Add or edit a strategy. (Select a strategy and it will be displayed for editing in the 'Strategy' text box below the list.
- c) Delete a factor.
- d) Delete a strategy.

You can reorder the list of strategies by selecting one and then using the up and down arrows to change its position in the list.

Later on you will be able to select particular factor / strategies which apply to a particular event. This will be detailed in the next chapter.

The same process applies to RAMS for Equipment, the Environment and Transport.

### **Configuring your own set(s) of RAMS.**

Click on the fifth tab ('Our RAMS') and the following screen will appear.

(This facility is under development at the time of writing.....)





## 2.11 RAMS – Critical Incident Management

In addition to the RAMS configured above you may specify up to ten Risks (significant potential losses) and your strategies for dealing with those events. For each strategy you may also specify any emergency gear required.

As shown in the illustration below, seven such risks and their strategies have been provided as defaults. You may edit them as you deem necessary.

Enter any Risks (significant potential losses)		These may be selected for inclusion in any particular event			
1	Injury or medical issue	Emergency gear required	6	Death of participant/staff/others	Emergency gear required
	Stop the party, assess and treat patient, manage rest of party, monitor and reassure. Consult appropriate service(s) (Police/Ambulance/Hospital/Doctor)	First aid kit Cell phone(s) Shelter		Secure and cover victim, manage and reassure group, alert relevant authorities, alert school to initiate emergency management plan, refer media to principal	Outside agencies School crisis management plan HELP beacon/cell
2	Negative psychological/emotional experience		7	Prosecution / Civil action	
	Debrief as appropriate, gain support as needed, facilitate psychological rescue of individuals or group, incident report as required, referral as needed	School counselling network Support networks in community		Keep accurate notes of all interactions and communications with everyone concerned. Access assistance from school and PPTA, and any relevant agencies	Liability insurance
3	Bad Public relations		8		
	Discuss with relevant people, police if necessary, file incident report, alert principal	Cell phone Follow up to relevant agency/person			
4	Loss of participant		9		
	Stop the group, establish where/when last seen and state of mind, complete written details, carry out search of immediate area as practical, seek assistance	Document details of incident Map of area Relevant authorities			
5	Environmental damage		10		
	Intervene if students are willfully or unknowingly damaging the environment and disposing of rubbish in an inappropriate way	Incident report follow up			

Later, these combinations may be selected as applying to individual events.

## 2.12 RAMS – Docs and guidelines

This section allows you to specify any documents and/or guidelines which your school finds useful when determining RAMS.

You may also use this screen to specify what you consider to be core competencies for EOTC events and the related desirable personal attributes to be displayed by leaders of the event with which they are associated.

**Documents and Guidelines**

The entries below will be the default entries for each event.  
They may be adjusted for individual events.

**National standards applicable**

Safety & EOTC : A good practice guide for New Zealand Schools 2002  
 Health and Safety in Employment Act 1992  
 Education Act 1989

**Policies and guidelines recommended**

School EOTC Safety Management Plan  
 School EOTC Crisis Management Plan  
 School Policies : EOTC

Core Competencies for EOTC are :	Desirable personal attributes include :
Leadership skills	Communication and empathy skills
First aid certification	Flexibility and motivation
Ability to identify and manage risks	Assertivness and ability to say 'No'
Crisis management skills	Approachability
Enviromental awareness skills	Safety conscious
Awareness of cultural values	Sound judgement and problem solving skills
Previous experience in trip/area	Good self concept
Group management skills	Ability to assess group dynamics

## 2.13 Hazards register

This screen allows you to maintain a list of known hazards from which you can later select when specifying which hazard or hazards might apply to a particular event. (It must be said that the examples below are intended to be spurious!)

<b>Hazards register</b> <small>Record the details of any known hazards. These may then be attached to individual events.</small>			
Risks What could go wrong?	Hazard Why would this happen?	Significant? Yes / No	Controls How can we prevent it?
A horse could jump over the fence	Billy Bumter could scare it	<input checked="" type="checkbox"/>	Don't take Billy on the trip
Sand could get in the teacher's shoes	Janice Smithers always throws sand around	<input type="checkbox"/>	Make sure Janice doesn't go on to the beach
Otira Gorge	Steeper than you think	<input checked="" type="checkbox"/>	Use low gear
Dangerous driving conditions	Snow on the passes	<input checked="" type="checkbox"/>	Watch warning signs at entry to pass (view via web before travelling)
		<input type="checkbox"/>	
		<input type="checkbox"/>	

## 2.14 SAP Entries

For those schools which prefer to specify Safety Action Plan entries, the following screen provides the facility to do that. (Again, the entries below are somewhat spurious)

<b>Safety Action Plan entries</b> <small>Record the details of any known SAP entries. These may then be attached to individual events.</small>					
What significant things could go wrong?	What would cause it to go wrong?	How could we prevent it from going wrong?	Whose responsibility is it?	When/where will it be done?	Emergency plan
The bicycles might have flat tyres	Jimmy could have forgotten to pump them up	Watch Jimmy like a hawk	Jimmy Barnes	Outside cycle surgery	Jenny will carry a spare pump
The bicycle bells might not work	Lack of oil in the mechanism	Ask Judy to oil them	Jill Usher	Before we leave	Jenny will carry spare oil

Enter the various details under the headings provided. Later, you will be able to attach selected SAP entries to each individual event.

## 2.15 Action Plan Goals

Each student may have various goals set for them and their progress towards the attainment of these goals may be monitored during the year. These goals are not event-specific and students' progress is recorded via their own data screens rather than via an event.

Action Plan Goals come under three headings :

- Individual Student Goals
- Student goals within the group
- Student goals outside the group

The package arrives with a single goal each with three benchmarks under each of the above headings. You may modify these to your own needs.

Later you can attach the default goals to individual students where you can modify them and add to them according to the needs of the individual.

The configuration screen is shown below.

Goals specified below will appear by default against each student.  
You may subsequently modify these (delete, edit or add) for individual students.

Double-click to edit a cell

#### Default individual student goals

Goal	Benchmark 1	Benchmark 2	Benchmark 3
e.g. To swim 1 km	Can swim 0.5km	Can swim 0.75km	Can swim 1 km

#### Default student goals **WITHIN** the group

Goal	Benchmark 1	Benchmark 2	Benchmark 3
To speak more in group activities	Small contributions	Medium contributions	Leads discussions

#### Default student goals **OUTSIDE** the group

Goal	Benchmark 1	Benchmark 2	Benchmark 3
To be more considerate at home	Does dishes	Asks to be able to help	Uses own initiative in helping

## 2.16 Photograph Directories

It is possible, via each student's basic details screen (and each staff member's screen) to attach photographs. For each student you may attach :

- A personal photograph
- A scan of his or her signature
- An image of the sole of a shoe

Each staff member may have a personal photograph displayed.

It is possible (indeed likely in the case of student photographs) that you already have these images stored in a specific directory and named according to a specified format.

This configuration screen allows you to specify both the image holding directory and the format of the photographs contained therein. Should you be able to make such

definitions then the relevant image(s) for each student / staff member will subsequently be automatically displayed on his or her screen without further action on your part.

The specification screen (with the list of possible formats for a student's image name shown) is shown below.

**Default Directories for Photograph Files**

**Student Photographs**

Student photographs are in the directory :

Photograph file names follow the format : 

FirstnameSurname.jpg

FirstnameSurname.jpg

firstnamesurname.jpg

Preferredname Surname.jpg

preferredname surname.jpg

PreferrednameSurname.jpg

preferrednamesurname.jpg

Firstname Surname.bmp

firstname surname.bmp

No fixed format

**Student Signatures**

Student signatures are in the directory :

Photograph file names follow the format :

**Student Footprints**

Student footprints are in the directory :

Photograph file names follow the format :

**Staff Photographs**

Staff photographs are in the directory :

Photograph file names follow the format :

---

## *Chapter 3*

### **Students**

What's in this chapter?	Page
3.1 Overview	3.1
3.2 Importing students from your SMS	3.3
3.3 Basic Information	3.5
3.4 Events this year	3.9
3.5 All events attended	3.11
3.6 Action Plan Goals	3.12
3.7 Caregiver details	3.13
3.8 Medical Details	3.15
3.9 General Notes	3.17
3.10 Sensitive Information	3.18
3.11 Blanket Approvals	3.18

#### **3.1 Overview**

It would be lovely to dive right in to the chapter on events themselves, which is obviously the most important aspect of the package. However, the second thing you need to do when specifying an event (after its title) is the Teacher in Charge. And, not too much further on, you'll want to attach students to the event.



You cannot do either of these until you have entered the students and staff members concerned into the database. So, it seems wise to cover Students and Leaders, Staff and Other BEFORE looking at events themselves.

This chapter, therefore, is concerned with the maintenance of the database of students. Click on the second button in the top row, labelled 'Students', and the student screen will appear, as shown below.

The screenshot shows the 'Students' screen of the software. At the top is a navigation bar with buttons for 'Events', 'Students' (which is highlighted in blue), 'Leaders, Staff and Others', 'Configuration', 'Printing Utility', 'Web Links', 'Search Utility', 'Other Utilities', 'Meetings', and 'Exit'. On the left side is a vertical blue bar labeled 'Student Selector - Click to Select/Hide'. This bar contains several buttons: 'Basic Information', 'Events this year', 'All events attended', 'Action Plan Goals', 'Caregiver details', 'Medical details', 'General Notes', 'Sensitive Information', and 'Blanket Approvals'. The main area of the screen is a light blue form. It contains various input fields for student information: 'Family name', 'First names', 'Preferred name', 'NSID', 'Year', 'Class', 'Form Teacher' (with a dropdown arrow), 'Gender' (with a dropdown arrow), 'Date of Birth', 'Ethnicity' (with a dropdown arrow), 'Address' (multiple lines), 'Post code', 'Phone number', 'Cell phone', and 'Email' (with a 'Send' button next to it). To the right of these fields is a 'Swimming Ability' section with several checkboxes: 'Can swim 50m', 'Confident in the pool', 'Confident in deep water', 'Able to tread water', 'Can survival float', 'Confident in the sea or open inland water', and 'Safety conscious in and around water'. Further right are two large empty boxes labeled 'Photograph' and 'Footprint'. At the bottom center of the form is a button labeled 'Add a new student'.

Down the left hand side of the screen is the blue Student Selector bar – which you click to select a student already in the database. If you already have students in your database then the selector will be 'out' ready for you to select a student.

Then comes the column of buttons which lead to the various data areas associated with each student.

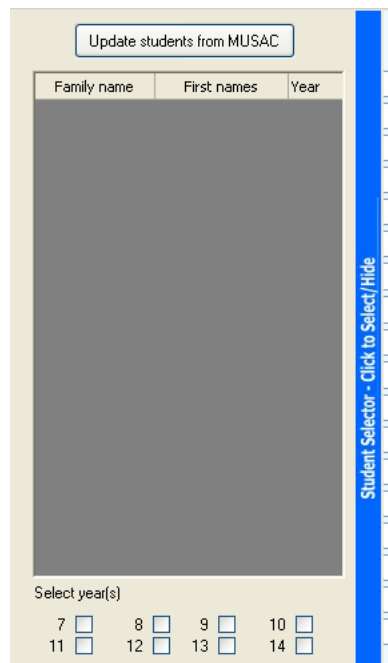
Finally, occupying the majority of the screen, is the area where the various data screens will appear.

## 3.2 Importing students from your SMS

If your school is using MUSAC, Kamar, PCSchool or IES as your SMS (Student management System) then you are able to import all students from that SMS. If NOT, then you must enter students manually as detailed in the following section 3.3

To import your students (having first visited configuration and either specified the link to MUSAC or generated the export file of data from one of the others and copied it into you \eotc directory – as detailed in section 2.2) you need to :

- a) Click on the blue Student Selector panel down the left hand edge of the screen. The student selector will slide out as shown below.



- b) Click on the button at the top of the slide out panel labelled 'Update students from MUSAC' (or ...Kamar etc). You will then see the small window shown below which explains the two options you have. Please read the message on this screen. What it says is true – that if you click elsewhere on the screen during the import process then the process will appear to freeze. It doesn't actually freeze. It is still occurring in the background, but the screen update which shows you where it is up to will not occur.

The student data will be imported. If you are importing from MUSAC at a time of the day when others might be using MUSAC then the process will

inevitably be slower than if no-one else was accessing the MUSAC databases.

(You can avoid this by creating a separate \cm directory (perhaps under \eotc) and copying the cm.mdb and sm.mdb databases from your MUSAC \cm directory into the copy directory – and then linking via configuration to the copy. This will indeed save some time but the link will no longer be 'Live'. i.e. you should subsequently relink via configuration back to the original MUSAC \cm directory.

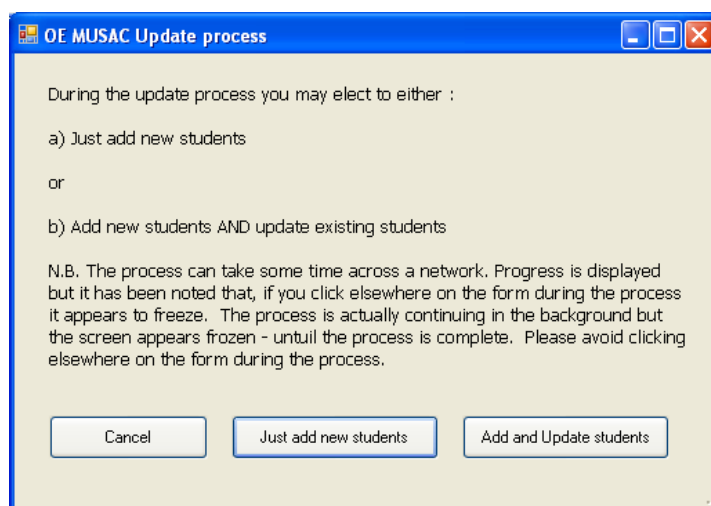
In the case of MUSAC quite a bit of student data is imported :

- basic details
- caregiver information
- medical information

The first step in the process is for the program to memorise the names of the students. After doing that it then runs through the list importing (or updating during a subsequent process) each student's data. (The freezing does not seem to happen once the main import process begins...)

On my computer – admittedly a stand-alone non-networked machine – each student took just over one second to import. A total of 3613 students were imported in 1hr 13mins, a rate of roughly 50 per minute.

Importing a file of 852 students from a Kamar export took only two minutes = but considerably less data for each student is available from kamar, PCSchool and IES. (For further details see Appendix)



### 3.3 Basic Information

If you are not using one of the four SMS packages then you must enter each student manually. To enter a new student click on the button labelled 'Add a new student' which is in the middle of the 'Basic Information' screen and begin typing. As suggested earlier, only enter that information which you know that you will require.

The following two pairs of screens are 'before' and 'after' illustrations.

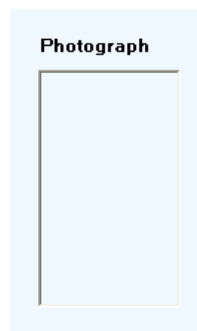
Field	Before	After
Family name		Adam
First names		James Alan
Preferred name		Jimmy
NSID		
Year		11
Class		11DR
Form Teacher		Butler, Rory
Gender		Male
Date of Birth		24/11/1993
Ethnicity		European
Address		49 Johns Terrace
		Wainuiokapa
Post code		5555
Phone number		467 7654
Cell phone		021 345 6789
Email		jimmy@ytra.co.nz

You may also enter details relating to the student's abilities concerning water safety.

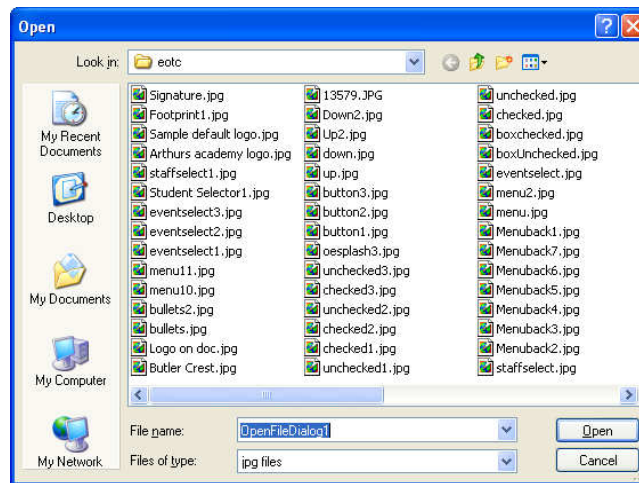
<b>Swimming Ability</b> <input type="checkbox"/> Can swim 50m <input type="checkbox"/> Confident in the pool <input type="checkbox"/> Confident in deep water <input type="checkbox"/> Able to tread water <input type="checkbox"/> Can survival float <input type="checkbox"/> Confident in the sea or open inland water <input type="checkbox"/> Safety conscious in and around water	<b>Swimming Ability</b> <input type="checkbox"/> Can swim 50m <input checked="" type="checkbox"/> Confident in the pool <input type="checkbox"/> Confident in deep water <input checked="" type="checkbox"/> Able to tread water <input type="checkbox"/> Can survival float <input checked="" type="checkbox"/> Confident in the sea or open inland water <input type="checkbox"/> Safety conscious in and around water
--	---

Finally, on the 'Basic Information' screen you can attach three photographs relating to the student.

If you are using one of the SMS packages and you have specified the necessary photograph directory information in configuration then the personal photo (and perhaps others) will automatically be shown. If not, then you may attach them manually by clicking on the photograph area in question.



When you click in a photograph frame the following dialogue window will appear ...

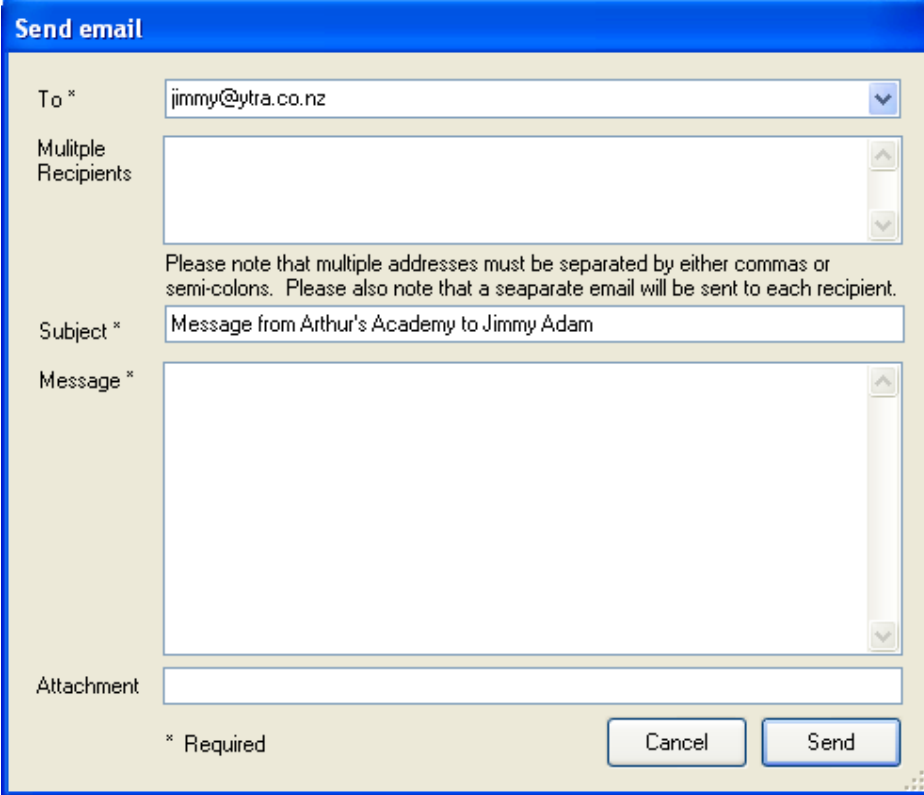


... via which you can select the required photograph. Photos should be saved as .jpg files which are relatively less demanding of disk space and memory.



You will notice a small button next to the student's email address. If you have an email address entered then clicking this button will take you to a dialogue via which you can send an email to that address via the program. (N.B. You must have first set the 'from' address (your email address) and your Internet Service provider's 'computer address' (not an email address) via configuration.

All this done, clicking the 'Send' button will take you to :



The image shows a 'Send email' dialog box with a blue title bar. It contains several input fields: 'To \*' with the email 'jimmy@ytra.co.nz', 'Multiple Recipients' (empty), 'Subject \*' with the text 'Message from Arthur's Academy to Jimmy Adam', and 'Message \*' (empty). There is a note about separating multiple addresses. An 'Attachment' field is at the bottom. 'Cancel' and 'Send' buttons are in the bottom right. A '\* Required' note is at the bottom left.

**Send email**

To \* jimmy@ytra.co.nz

Multiple Recipients

Please note that multiple addresses must be separated by either commas or semi-colons. Please also note that a seaparate email will be sent to each recipient.

Subject \* Message from Arthur's Academy to Jimmy Adam

Message \*

Attachment

\* Required

Cancel Send

All you have to do is to type in your message and click 'Send'. Unfortunately this process does NOT leave a record of the sent message in your email program's 'Sent items'.

### 3.4 Events this year

Once you have been using the package for a little while you can click on the second button down to view a list of all of the events attended by the selected pupil during the current year. An example of this screen is shown below (with some rather spurious 'events' – the observant amongst you will spot that the dates were entered in 2009 and 2010 when the package was first under development).

**Completed events attended by Jimmy Adam**

Date	Event
5/05/2010	Catching fish
4/05/2010	Gathering Mulberries
3/04/2009	Climbing hills
12/03/2010	Rock Climbing
11/03/2010	Tree Climbing

**Event Details**

Title: Catching fish  
 Dates: 05/05/2010 - 07/05/2010  
 Teacher in Charge: Hay, Elizabeth  
 Location: Clutha River

**Student-specific Details**

Consent form completed: ☒  
 Student Helper: ☐  
 Teacher Aide if Required:   
 Cost: 16.80 Paid: ☒  
 Date of last Tetanus Injection: 12/10/2008  
 Comment: This comment suggests that Jimmy had an extremely positive experience during the fishing trips.

**Student strengths** **Roles**

Criteria	Attained
Self-confidence	<input type="checkbox"/>
Creativity	<input type="checkbox"/>
Faith and trust in others	<input type="checkbox"/>
Physical endurance	<input type="checkbox"/>
Sense of humour	<input type="checkbox"/>
Commitment to my values	<input checked="" type="checkbox"/>
Hard work	<input type="checkbox"/>
Stability	<input type="checkbox"/>
Courage	<input type="checkbox"/>
Independence	<input checked="" type="checkbox"/>
Honesty	<input type="checkbox"/>
Loyalty to others	<input checked="" type="checkbox"/>
Commitment to others	<input type="checkbox"/>
Flexibility	<input type="checkbox"/>
Acceptance of others	<input type="checkbox"/>
Assertiveness	<input type="checkbox"/>
Empathy with others	<input checked="" type="checkbox"/>
Inner security	<input type="checkbox"/>
Self_discipline	<input type="checkbox"/>
Open_mindedness	<input type="checkbox"/>
Acceptance of events	<input type="checkbox"/>

Click on each event and you will be able to view further information relating to the selected event. You can also add student-specific information relating to the event and can also, via the right hand side of the screen, record information relating to Student Roles and Student Strengths. The latter two are lists of possibilities set up under each event – and this will be covered in the chapter relating to Events.

At the top of the right hand side you can click on the second tab to view/edit



information relating to Student Roles – an example of which is shown below.

Criteria	Attained
Task Roles	
- Initiator contributor	<input type="checkbox"/>
- Information seeker	<input type="checkbox"/>
- Opinion seeker	<input checked="" type="checkbox"/>
- Information giver	<input type="checkbox"/>
- Opinion giver	<input checked="" type="checkbox"/>
- Elaborator	<input checked="" type="checkbox"/>
- Coordinator	<input type="checkbox"/>
- Orienter	<input checked="" type="checkbox"/>
- Evaluator-critic	<input type="checkbox"/>
- Energiser	<input type="checkbox"/>
- Procedural	<input type="checkbox"/>
- Recorder	<input type="checkbox"/>
Process Roles	
- Encourager	<input type="checkbox"/>
- Harmoniser	<input type="checkbox"/>
- Compromiser	<input type="checkbox"/>
- Gatekeeper and expeditor	<input type="checkbox"/>
- Standard setter	<input type="checkbox"/>
- Group Observer and com	<input type="checkbox"/>
- Follower	<input type="checkbox"/>
Anti-group Roles	
- Blocker	<input type="checkbox"/>

### 3.5 All events attended

Once you've been using the package for more than a year then clicking on the next button down will display a list of all EOTC events EVER attended by the selected student. The program goes looking for previous databases as far back as 2011 and identifies and lists the student's previous event attendances.

**All events attended by Jimmy Adam**

**Events Completed**

Year	Date	Event
2011	5/05/2010	Catching fish
2011	4/05/2010	Gathering Mulberries
2011	3/04/2009	Climbing hills
2011	12/03/2010	Rock Climbing
2011	11/03/2010	Tree Climbing

**Title** Catching fish  
**Dates** 05/05/2010 - 990157  
**Teacher Aide**  
**Teacher in Charge** Hay, Elizabeth  
**Location** Clutha River  
**Cost** 16.80

**Comment**  
This comment suggests that Jimmy had an extremely positive experience during the fishing trips.

Clicking on a particular event on the list will cause further details relating to that event to be displayed.

### 3.6 Action Plan Goals

You will remember that the default set of Action Plan Goals may be set up via configuration. When you first view a student's set of goals only the default set will be displayed. However, you can right-click in any of the three grids to access a window via which you can add modify the list. In the example below a new goal and three benchmarks have been added to the student's Individual Goals.

**Action Plan / Goals for Jimmy Adam**

**Personal Action Plan**

Individual Goals

Goal	Attained
e.g. To swim 1 km	
Benchmark 1 : Can swim 0.5km	<input checked="" type="checkbox"/>
Benchmark 2 : Can swim 0.75km	<input checked="" type="checkbox"/>
Benchmark 3 : Can swim 1 km	<input checked="" type="checkbox"/>
To climb mountains	
Benchmark 1 : Climb a small hill	<input checked="" type="checkbox"/>
Benchmark 2 : Climb a big hill	<input type="checkbox"/>
Benchmark 3 : Climb Mount Cook	<input type="checkbox"/>

**Goals within the group**

Goal	Attained
To speak more in group activities	
Benchmark 1 : Small contributions	<input checked="" type="checkbox"/>
Benchmark 2 : Medium contributions	<input type="checkbox"/>
Benchmark 3 : Leads discussions	<input checked="" type="checkbox"/>

**Goals outside the group**

Goal	Attained
To be more considerate at home	
Benchmark 1 : Does dishes	<input checked="" type="checkbox"/>
Benchmark 2 : Asks to be able to help	<input type="checkbox"/>
Benchmark 3 : Uses own initiative in helping	<input checked="" type="checkbox"/>

**Negative influences that could prevent goal attainment**

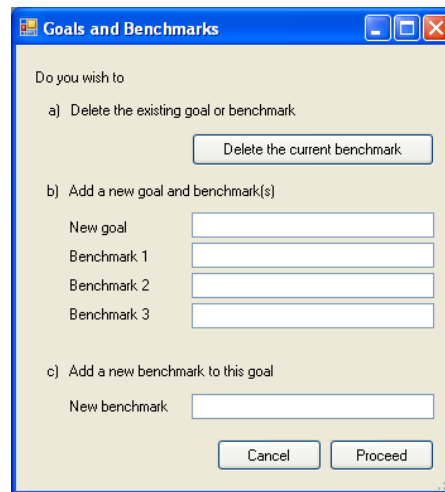
Negative influences here

**Teacher comment**

Teacher comment here

Reset all goals to the default goals

The window which appears when you right-click and which allows you to add further goals is shown below.



**Goals and Benchmarks**

Do you wish to

a) Delete the existing goal or benchmark

b) Add a new goal and benchmark(s)

New goal

Benchmark 1

Benchmark 2

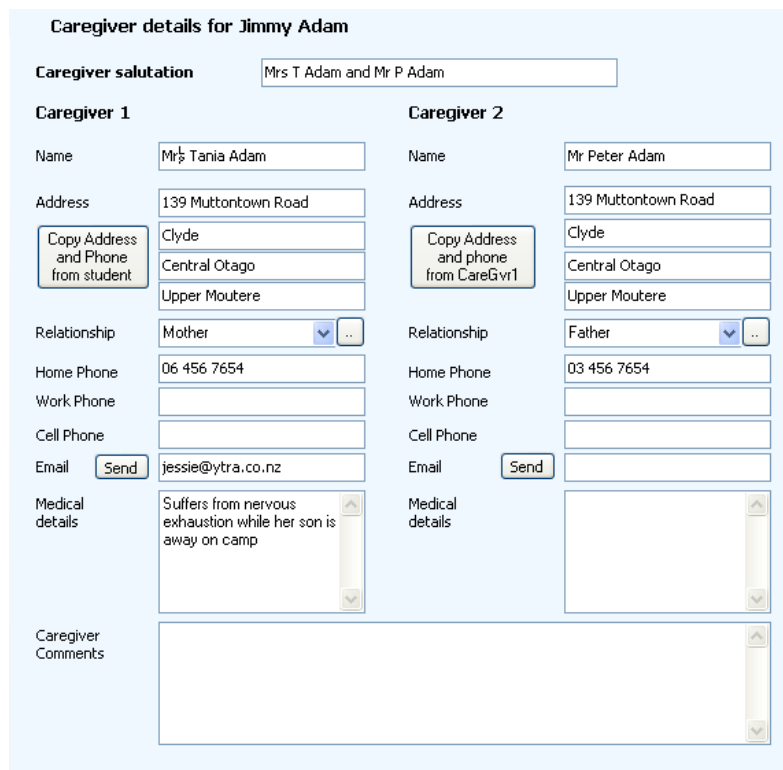
Benchmark 3

c) Add a new benchmark to this goal

New benchmark

### 3.7 Caregiver details

This screen displays (and allows you to enter) information relating to the student's first two caregivers.



**Caregiver details for Jimmy Adam**

**Caregiver salutation**

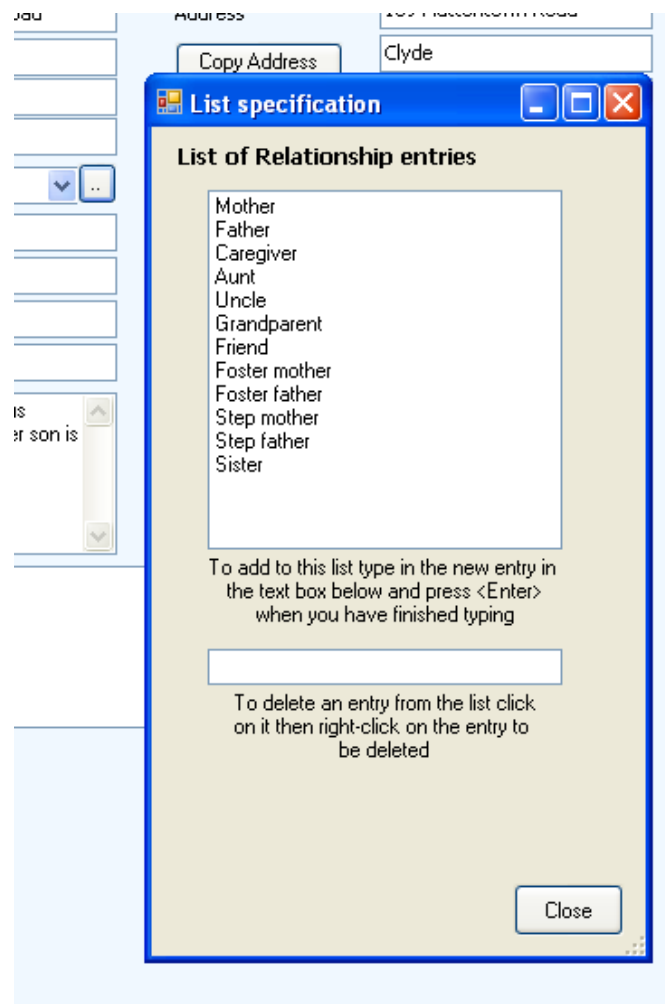
Caregiver 1		Caregiver 2	
Name	<input type="text" value="Mrs Tania Adam"/>	Name	<input type="text" value="Mr Peter Adam"/>
Address	<input type="text" value="139 Muttontown Road"/>	Address	<input type="text" value="139 Muttontown Road"/>
<input type="button" value="Copy Address and Phone from student"/>	<input type="text" value="Clyde"/>	<input type="button" value="Copy Address and phone from CareGvr1"/>	<input type="text" value="Clyde"/>
	<input type="text" value="Central Otago"/>		<input type="text" value="Central Otago"/>
	<input type="text" value="Upper Moutere"/>		<input type="text" value="Upper Moutere"/>
Relationship	<input type="text" value="Mother"/> ..	Relationship	<input type="text" value="Father"/> ..
Home Phone	<input type="text" value="06 456 7654"/>	Home Phone	<input type="text" value="03 456 7654"/>
Work Phone	<input type="text"/>	Work Phone	<input type="text"/>
Cell Phone	<input type="text"/>	Cell Phone	<input type="text"/>
Email	<input type="text" value="jessie@ytra.co.nz"/> <input type="button" value="Send"/>	Email	<input type="text"/> <input type="button" value="Send"/>
Medical details	<input type="text" value="Suffers from nervous exhaustion while her son is away on camp"/>	Medical details	<input type="text"/>
Caregiver Comments	<input type="text"/>		

Most on the screen will be obvious.

There are two 'Send' buttons which you can use to send an email to the caregiver in question.

There are two buttons labelled 'Copy Address and Phone from Student'. Clicking either does exactly that. While this should not be necessary for MUSAC users it will be of help to those using a different SMS.

There are two further small buttons each next to one of the 'Relationship' popups. Clicking one of these will cause a window to appear via which you can add a new relationship to the list of those already there. This window appears as :



All you have to do is to type your new entry into the empty text box and press the <Enter> key. You can also delete an unrequired entry by left-clicking on it to select

it and then right-clicking on the same entry. You will then be asked to confirm the deletion.

This completes 'caregiver Information'.

### 3.8 Medical details

EOTC requires considerable information relating to the student's medical situation. Consequently there are three tabs on the 'Medical Details' screen

The first is labelled 'medical Details' and is where the student's basic medical information is recorded. This screen is shown below.

**Medical information for Jimmy Adam**

Medical Details | Other medical details | Health Care Plan

Condition	Has	Severity	Medication details
Migraine	<input type="checkbox"/>		
Diabetes	<input checked="" type="checkbox"/>	Mild	
Chronic nose bleeds	<input checked="" type="checkbox"/>	Severe	Keeps cotton wool at his side at all times
Colour blindness	<input type="checkbox"/>		
Epilepsy	<input checked="" type="checkbox"/>	Moderate	Tablets in his satchel
Travel sickness	<input type="checkbox"/>		
Heart condition	<input type="checkbox"/>		
Asthma	<input type="checkbox"/>		
Fits of any type	<input type="checkbox"/>		
Dizzy spells	<input type="checkbox"/>		
	<input type="checkbox"/>		
	<input type="checkbox"/>		
	<input type="checkbox"/>		
	<input type="checkbox"/>		
	<input type="checkbox"/>		
	<input type="checkbox"/>		

Doctor: Ames [v] [...] Dentist: [v] [...]  
 Phone : 345 6789  
 Tararua Medical Centre

Further Information: [text area]

Community Services Card Number: 12345-6789-0987-543  
 Medic Alert Number: 76715  
 Date of last Tetanus Injection: 12/10/2008

The small 'three dots' button next to 'Condition' in the first column headings takes you to a screen which allows you to modify the list of conditions listed.

Simply clicking in the 'Severity' column will cause the entry to rotate through its various possibilities. A little experimentation will make the process obvious.

The 'three dots' button process is also available to enable you to update the lists of doctors and dentists.

The second tab is labelled 'Other medical Details' and this, shown below, is where you record information relating to Allergies, Dietary Requirements, Pain/Flu medications approved and any special details to ensure the student's physical and emotional security.

**Medical information for Jimmy Adam**

Medical Details | **Other medical details** | Health Care Plan

Allergies

Condition	Has	Severity	Medication details
Bee/wasp stings	<input checked="" type="checkbox"/>	Mild	
Nuts	<input checked="" type="checkbox"/>	Moderate	Dont let him have peanuts. Get the antidote from his sister.
Antibiotics	<input type="checkbox"/>		
Animal hair	<input checked="" type="checkbox"/>	Severe	Brush frantically
	<input type="checkbox"/>		
	<input type="checkbox"/>		
	<input type="checkbox"/>		
	<input type="checkbox"/>		

Health Plan (for details click on the tab above)

Dietary Requirements

Jelly babies  
for all  
the time

Pain/Flu medications approved

Panadol  
Aspirin  
Minties

Special details to ensure physical and emotional safety

Check with the dean daily  
if not hourly.

The final tab is labelled 'Health Care Plan' and this screen is used to record the details of the student's specific health care Plan – if any. The example entries below are, as usual, somewhat spurious.

Medical information for Jimmy Adam	
Medical Details	Other medical details
Health Care Plan	
From date	To
03/03/2010	09/09/2010
Health condition or diagnosis :	What student must not do because of his/her health conditions :
Warts on his nose	Wear a funny hat at all times
Symptoms of health needs :	Daily care needs at school : people, tasks, equipment:
Hat falling down over ears	Dean / Counsellor and ointment
Health/Medical Contacts	
Key Worker :	Hospital :
Christine Floggerty	Kenepuru Emergency
Specialists :	Key staff member :
Dr Janice Morgan	Jenny Chambers
Family Doctor : Ames	
Classroom Numbers and relevant timetable information	
Room 17 and takes Physics instead of Phys Ed on fridays	
Emergency Procedures :	
An emergency is when :	Critical information for emergency services (event, location, name of caller, response required) :
His hat falls down	Jimmy Chapman to ring 111
Emergency action (who does what) :	Follow up care required :
Dean pulls it up again	More ointment
Emergency phone/contact :	Where emergency procedures are kept and who has a copy :
Dean 03 444 55678	In the cupboard in B12 and Joan has the key

### 3.9 General Notes

This screen enables you to record general notes relating to the student.

General Notes for Jimmy Adam	

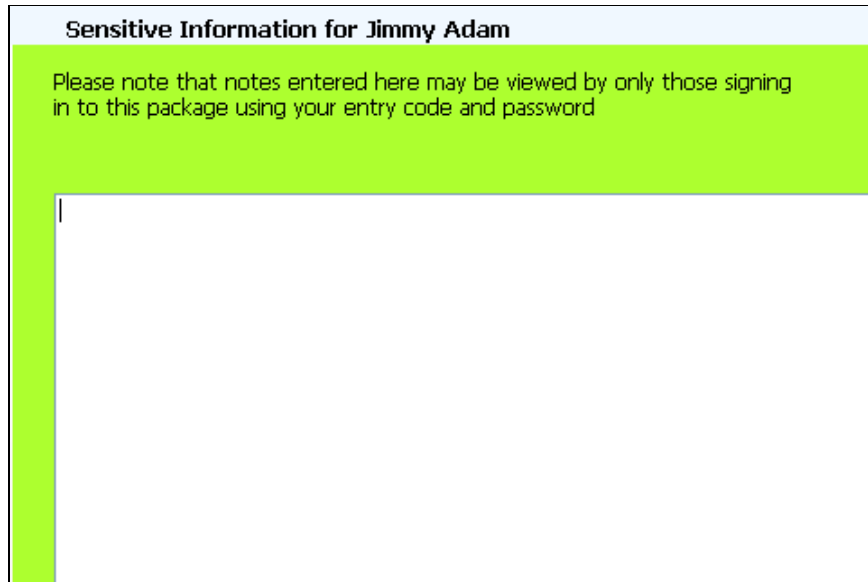


---

It's a large screen and you have plenty of space.....

### 3.10 Sensitive Information

... as you also have on the following screen where you may record sensitive information relating to the student.



Yes, it's a little garish but it reminds you that you are on a page slightly different to the others. You are the only one who can view the information which you record here. If another person accesses the package and records sensitive information concerning the same student then you will not be able to view that information. It is private to the person typing it in (as identified by your entry code).

### 3.11 Blanket Approvals

Parental approvals are required for a variety of reasons and they can be set for individual students via this screen. These are then reported on certain documents associated with events attended by the student.

Two buttons at the bottom of the screen allow you to tick them all with one click or to untick them all with a single click. The screen is shown below.

**Blanket Approvals for Jc      lam**

**The following consents have been received for the year : 2011**

☒ Agreement that if prescribed medication needs to be administered, a designated adult will be assigned to do this. I will ensure that prescribed medication is clearly labelled, securely fastened and handed to the designated adult with instructions on its administration.

☒ Approval to student receiving any emergency medical, dental, or surgical treatment, including anaesthetic or blood transfusion, as considered necessary by the medical authorities present.

☒ Agreement to meet any medical costs not covered by ACC or a community services card

☒ Agreement to inform the school as soon as possible of any changes in the medical or other circumstances between now and the commencement of the event.

☒ Agreement that if student is involved in a serious disciplinary problem, including the use of illegal substances and/or alcohol, or actions that threaten the safety of others, s/he will be sent home at parents'/caregivers' expense.

☒ Consent to use photos and other media for publicity

Finally, further details relating to the student's screen.

There are three ways to move to a different student.

To move to the next or previous student use the two buttons at the bottom of the left hand side of the screen.

To move to a particular student you can click on the blue Student Selector slide to pull the slide out then slide the vertical slider down until the student is visible, then click on their name. You can have just one or more year levels displayed by clicking in the year level box(es) at the bottom of the Student Selector slide – but it does take a moment or two while the unrequired students are hidden.

By far the easiest way to move to a particular student is to :

- Press Alt-s (for Search) – and a search window will be displayed.
- Type the first few letters of the student's family name (until only a few students are listed)
- Press the number of the student required.

This takes you very rapidly to a particular student without using the mouse.

Let's now turn our attention to 'Leaders, Staff and Others'



# ***Chapter 4***

## **Leaders, Staff and Others**

What's in this chapter?	Page
4.1 Overview	4.1
4.2 Importing Staff Members	4.2
4.3 Basic Details	4.3
4.4 Events attended	4.6
4.5 Emergency Details	4.7
4.6 Medical Details	4.7
4.7 Skills	4.8
4.8 Qualifications	4.9

### **4.1 Overview**

In this chapter we'll deal with the processes involved in maintaining the database of staff members, contractors, organisations and other adults.

If you are using MUSAC then it is possible to import all of your staff members from the MUSAC staff database, following the same procedure used to import your students. (i.e. click on the green Staff Sector panel at the left hand side of the screen and then click 'Update Staff from MUSAC' (see section 4.2).

The main screen is as shown below :

Down the left hand side of the screen is the green Staff Selector bar – which you click to select a previously specified adult.

Then comes the column of buttons which lead to the various processes associated with the adult.

Finally, occupying the majority of the screen, is the area where the various process windows will appear.

Initially the screen for Basic Details is displayed, as shown above.

If you already have students in your database then the selector will be 'out' ready for you to select a person.

## 4.2 Importing Staff members

As suggested above, you can, if you are using MUSAC as your SMS, import staff details directly from the MUSAC Staff database.

To do this, click on the green Staff Selector panel to slide it out and then click on the button at the top of the slide labelled 'Update Staff from MUSAC'. Your staff

members will be imported and displayed in the selector screen. During the process you will see a list of the people processed e.g. :


Updated Ade	rod
Updated Aik	
Updated Anc	Jan
Updated Anc	Jeanne
Updated Bat	Ann
Updated Bay	rgaret
Updated Bec	rgina
Updated Blac	rglas
Updated Boc	atherine
Updated Che	Jeanette
Updated Coc	stine
Updated Corl	Gary
Updated Cro	a
Updated Dav	Bridget
Excluded Da	elia : Reliever
Updated Dicl	erine
Updated Dur	ndy
Updated Dur	ris
Updated Eve	son
Updated Fae	a
Excluded Far	I : Reliever
Updated Finn	skie
Excluded For	drew : Reliever
Updated Fro	dan
Updated Gec	atherine
Updated Gibl	tacey
Updated Gill	

Staff - Click to select

### 4.3 Basic details

The first screen is the Basic Details screen, as example of which is shown below.

**Basic Details for Rory Butler**

Family name: <input type="text" value="Butler"/>	Position: <input type="text" value="DECoordinator"/>	<b>Photograph</b>  (Click to attach)
First names: <input type="text" value="Rory"/>	Faculty: <input type="text" value="Mathematics"/>	
Category: <input type="text" value="Teacher"/>	Departments: <input type="text" value="English Mathematics"/>	
Code: <input type="text" value="BT"/>		
Gender: <input checked="" type="radio"/> Male <input type="radio"/> Female		
Date of Birth: <input type="text" value="19/12/1943"/>		
House: <input type="text" value="Ngarimu"/>		
Address: <input type="text" value="4 John Street"/>		
<input type="text" value="Levin"/>		
<input type="text" value="Manawatu"/>		
Home phone: <input type="text" value="06 356 3344"/>		
Cell phone: <input type="text" value="021 445 0455"/>		
School Email: <input type="text" value="randcbutler@inspire.net.nz"/> <input type="button" value="Send"/>		
Home Email: <input type="text" value="randcbutler@paradise.net.nz"/> <input type="button" value="Send"/>		
<div> <input type="button" value="Add a new staff member"/> <input type="button" value="Remove this staff member"/> <input type="button" value="Add a new contractor / organisation"/> </div>		

**Transport Details**

Drivers License: Number  Issue Date  Expiry Date

Areas:

Vehicles: Vehicle 1 Make  Model  Colour  Registration  Vehicle 2 Make  Model  Colour  Registration

**Swimming Details**

☒ Can swim 200m confidently and competently

☒ Can tread water for 3 minutes

☒ Can swim in deep water and rescue a student

**Police Vetting**

Vetted by Police: ☒

Application Date:

Approval Date:

Expiry Date:

Having read the chapter on Students you will, hopefully, find no surprises on this screen.

There are several 'Dots buttons' which you can click to allow you to alter the list of possibilities shown for ;

- Category
- House
- Position
- Faculty
- Transport Areas

There are two 'Send' buttons which enable you to send an email to either the school email address or the home email address.

The photograph can be attached in the same way as for students – but clicking on the photo area and following the image selection dialogue which appears. If you have connected to a directory and specified a photograph name format for staff in configuration then the photograph, if it exists correctly named in that location, should automatically appear.

Remember that you can 'search' for a staff member using the Alt-s key. This will pop up a small window and you need to type the first few letters of the staff member's family name and then press the number key corresponding to their position in the list of possibilities displayed.

To add a further adult click on the button labelled 'Add a new staff member' and type in their details.

### **Contractors and Organisations**

The screen above is great for recording details relating to staff members and other individual adults. However, when it comes to contractors and organisations, a different data screen is necessary.

To add a contractor or organisation click on the button labelled 'Add a new contractor/organisation' and the new 'Basic Details' screen will appear. You will see, on the illustration below, that there are different items of information required.

On the right hand side of the screen there are three tabs, each relating to a separate

area of interest. There are three corresponding 'cloudy-blue buttons' which open each of the tabs and you can either click on these or one the tabs themselves. The tab shown in the illustration is 'Referees'.

**Contractors and organisations**

Name: Sir Edmund Hillary Outdoor Pursuits Centr

Category: Organisation

Contact Person: Edmund Hillary

Address: 15 feet north  
South Face  
Mount Everest

Business Phone: 07 654 3212

Cell Phone: 021 666 5555

Fax:

Email: sired@xtra.com.nz

Time as a contractor:

**Referees and Recommended by**

**Referee 1**

Name: Jimbo Everready

Address: 26 Chandler Crescent  
Clyde

Contact Phone: 06 398 4567

**Referee 2**

Name:

Address:

Contact Phone:

**Recommended by**

Buttons: Add a new contractor / organisation, Add a new staff member, Referees and Recommender, Criteria and Leaders Qualities, Safety procedures and First Aid

The other two tabs (with illustrations below) are :

Criteria and leaders

**Criteria and Leader Qualities**

**Criteria details**

Do you have selection standards for your staff? ☒

They must all pass our rigorous initiation process.

Do you have training standards for your staff? ☒

Yes - they all have School Cert prior to 1950.

Do these standards comply with nationally accepted best practice standards? ☒

Does your organisation regularly monitor compliance with these standards? ☐

No - once you've got School Cert they can't take it away.



## Safety procedures

Referees
Criteria and leaders
**Safety Procedures**
Transport

**Safety Procedures**

- Are records kept of incidents (fatality, near miss, injury, illness, property damage, behavioural problems)? ☒
- Are logs kept of equipment use? ☐
- Is there are safety/risk management plan (eg RAMS or SAP) and standard operating procedures (SOPS) for each activity? ☒
- Will safety/risk management plans and SOPS (including emergency procedures) for all activities this school will be involved in be supplied? ☒
- Will personnel allocated for each event meet accepted best practice standards for all activities they will lead? ☐

## 4.4 Events Attended

**Events Completed**

Date	Event
4/05/2009	Gathering Mulberries
12/03/2010	Rock Climbing

**Event Details**



Title	Rock Climbing
Dates	12/03/2010 - 14/03/2010
Teacher in Charge	Cameron, Ros
Location	Wanaka Rock Wall

This screen displays all of the events attended by this staff member in the current year.

## 4.5 Emergency Details

This screen allows you to record emergency contact details for the staff member concerned.

The 'dots' buttons allow you to alter the list of 'relationship' possibilities.

Emergency Contacts for Rory Butler			
	Emergency Contact 1		Emergency Contact 2
Name	<input type="text" value="Christine Butler"/>		<input type="text" value="Angela Scarsbrook"/>
Address	<input type="text" value="46 Pannel Ave&lt;br/&gt;Wainoni&lt;br/&gt;Chsitchurch"/>		<input type="text" value="84 Galloway Street"/>
Relationship	<input type="text" value="Wife"/> 		<input type="text" value="Daughter"/> 
Phone (day)	<input type="text" value="03 446 3355"/>		<input type="text" value="07 856 8822"/>
Phone (Evening)	<input type="text" value="06 446 3355"/>		<input type="text" value="07 856 8822"/>
Phone (Cell)	<input type="text" value="021 112 2333"/>		<input type="text" value="025 123 4567"/>

## 4.6 Medical Details

On this screen you can record the medical details relating to the staff member concerned.

As usual, the 'dots' button allows you to alter the list of Doctors.

**Medical Details for Rory Butler**

**Doctor** Ames   **Community Card No.** 12345-6666-7777-888

**Medical conditions** Phone : 345 6789 Tararua Medical Centre **Medic Alert No.** NZ449

Condition	Has	Severity	Medication details (Taking any - if so, what?)
Diabetes	<input checked="" type="checkbox"/>	Moderate	
Colour blindness	<input checked="" type="checkbox"/>	Mild	
Heart condition	<input checked="" type="checkbox"/>	Severe	Pills in the cupboard in B12
Migraine	<input type="checkbox"/>		
Chronic nose bleeds	<input type="checkbox"/>		
Epilepsy	<input type="checkbox"/>		
Travel sickness	<input type="checkbox"/>		

**Allergies**

Condition	Has	Treatment required
Prescription Medication	<input type="checkbox"/>	
Food	<input checked="" type="checkbox"/>	Always hungry
Insect bites/stings	<input checked="" type="checkbox"/>	
Other allergies	<input type="checkbox"/>	

**Tetanus Injection Date** 11/12/1987

**Medication Approval**

☒ Approval to administer medications if necessary

Panadol, Aspirin

**Major Injuries** Any major injuries or illnesses in the last six months which might limit full participation in planned activities.

Only hiccups

**Dietary requirements**

No scrambled eggs

**Other Medical Information** Any other relevant information concerning medical conditions

Nothing otherwise known

## 4.7 Skills

The 'Skills' screen is where you can keep a record of skills relevant to EOTC possessed by the staff member displayed.

The 'Dots' button at the top of the 'Skill' column allows you to add further skills to the list of possibilities.

Skills may or may not have expiry dates. (I suspect that they do.... )

**Skills Record for Rory Butler****Skills**

Skill	Has	Expiry date	Notes
Workplace First Aid	<input type="checkbox"/>		
Outdoor First Aid	<input checked="" type="checkbox"/>	3/5/2009	In abundance
PHEC	<input type="checkbox"/>		
Ambulance Officer	<input type="checkbox"/>		

## 4.8 Qualifications

This page allows you to record staff member qualifications. Initially there will be nothing showing on the table at the top of the screen. To add an entry to this table select from the popup box at the top of the grid.

Date Gained	Type	
3/03/2008	Cert	
5/05/2009	Card	

Add a qualification ▼ ...

- RLSSNZ Resus
- RLSSNZ Instructor
- RLSSNZ Examiner
- NZDIA Abseil Leader
- NZDIA Apline 1
- NZDIA Alpine 2
- NZDIA Bush Walking Leader
- NZDIA Bush 1

The 'dots' button can be used to add further qualifications to the list.

Below the grid are three areas where you can record details relating to the adults qualifications with respect to :

- First Aid certificate
- Teacher registration

- Life Saving certificate

**Qualifications for Rory Butler**

**Qualifications** Add a qualification

Qualification	Has	Issued by	Date Gained	Type	Next due	Last refresher	Notes
NZOIA Abseil Leader	<input type="checkbox"/>	NZDA	03/03/2008	Cert			
NZOIA Cave 1	<input type="checkbox"/>	NZDA	05/05/2009	Card			
NZOIA Bush Walking Leader	<input type="checkbox"/>	ST John			05/05/2011	06/06/2010	Carefully tested
Search Methods	<input type="checkbox"/>						

**First Aid Certificate**

Current ☐

Type

Valid until

Date lapsed

**Teacher Registration**

Current ☒

**Life Saving Certificate**

Current ☒

Type

Valid until

Date lapsed

You can move to the previous or next adult by clicking on the relevant button at the bottom of the left hand column of buttons. However, the fastest way to move to a particular staff member is to use the Alt-S process described for students and also earlier in this chapter.

OK. We've now covered all of the essentials and we are ready to move to the main topic of interest – the events themselves.

# ***Chapter 5***

## **Events**

What's in this chapter?	Page
5.1 Overview	5.1
5.2 Approval in principle	5.3
5.3 Event Approval	5.6
5.4 Other adults involved	5.11
5.5 RAMS and SAP	5.13
5.6 Attach Students	5.18
5.7 Documents	5.19
5.8 Student Strengths	5.20
5.9 Student Roles	5.22
5.10 Senior leader Evaluation	5.23
5.11 Event report and Evaluation	5.24
5.12 Incidents Log	5.25
5.13 Send Emails	5.29

### **5.1 Overview**

Now it's time to really get into it. This chapter deals with events and includes the processing associated with planning an event, the documents related to the process and the various follow-up processes associated with the event. The various

processes are listed above and we'll deal with them in that order. This corresponds to the order on the main event screen :

Down the left hand side of the screen is the Event Selector bar – which you click to select a previously specified event.

Then comes the column of buttons which lead to the various processes associated with the event.

Finally, occupying the majority of the screen, is the area where the various process windows will appear.

Initially the screen for Approval in Principle is displayed, as shown above.

## 5.2 Approval in Principle

On first entry to the package you will have no events specified, so the first thing to do is to click the button labelled 'Add a new event'. This will clear the display of anything relating to any previously displayed event and warn the program that a new event is about to be entered.

The details on this screen....

**Basic Details of the event - required for the Event Approval in Principle Application**

<b>Title</b> <input type="text"/> <b>Location</b> <input type="text"/> <b>Person in Charge</b> <input type="text"/> <b>Teacher code</b> <input type="text"/> <b>Approximate cost per student \$</b> <input type="text"/> <b>Approximate Dates</b> Term <input type="text"/> Week <input type="text"/> <b>Curriculum Area</b> e.g. History Drama <input type="text"/> <b>Event added to Event Planner</b> <input type="checkbox"/> <b>Event Coordinator Informed</b> <input type="checkbox"/> <b>Principal Approval gained</b> <input type="checkbox"/> <input type="button" value="Add a new event"/> <input type="button" value="Print blank Approval in Principle form"/> <input type="button" value="Print Approval in Principle form with details"/>	<b>Staffing</b> Click all that apply Teachers <input type="checkbox"/> Parents <input type="checkbox"/> Volunteers <input type="checkbox"/> Coaches <input type="checkbox"/> Contractors <input type="checkbox"/> Senior Leaders <input type="checkbox"/> Student Teacher <input type="checkbox"/> Work Placement <input type="checkbox"/> <b>Time Period</b> Click all that apply Period <input type="checkbox"/> Half day <input type="checkbox"/> School hours <input type="checkbox"/> Whole day <input type="checkbox"/> Evenings <input type="checkbox"/> Overnight <input type="checkbox"/> Multi-day <input type="checkbox"/> Weekend <input type="checkbox"/> Holidays <input type="checkbox"/> <b>Type of Event</b> Click all that apply Curriculum <input type="checkbox"/> Outdoor Pursuits <input type="checkbox"/> Sports trip <input type="checkbox"/> Club <input type="checkbox"/> Cultural <input type="checkbox"/> Arts <input type="checkbox"/> Water <input type="checkbox"/> Alpine / Bush <input type="checkbox"/> Urban <input type="checkbox"/>	<b>Outside Contractor</b> <input type="text"/> <b>Contact</b> <input type="text"/> <b>Role</b> <input type="text"/> <b>Transport Details</b> ... Click all that apply By foot <input type="checkbox"/> By bikes <input type="checkbox"/> By van(s) <input type="checkbox"/> Staff vehicle(s) <input type="checkbox"/> Adults driving cars/vans <input type="checkbox"/> By bus <input type="checkbox"/> Students driving car(s) <input type="checkbox"/> Students driving students <input type="checkbox"/> <b>Accommodation Details</b> ... Click all that apply Motel <input type="checkbox"/> Camping ground <input type="checkbox"/> Hotel <input type="checkbox"/> Tents <input type="checkbox"/> Backpackers <input type="checkbox"/> Cabins <input type="checkbox"/> Billets <input type="checkbox"/> Host families <input type="checkbox"/>
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... are those required to complete an 'Approval in Principle' request. Depending on the nature of the event you may or may not need to fill in all areas. This will be a policy decision made by the school's Event Coordinator.

There are two buttons in the bottom left hand corner of this screen which you can use to generate the Approval in Principle document for this event. One will generate a document with no details filled in and the other will generate the same documents but with the details you have entered filled in.

An example of the 'Approval in Principal' document is shown below.



**Arthur's Academy**

## EOTC and Sports Events : Approval in Principle 1.0

**Information:** Complete this form and give it to the EOTC Coordinator. The coordinator will then pass it on to the principal to sign off approval in principle. You then need to follow up EOTC Event Approval systems. Remember that all paperwork is due in two weeks prior to the event.

<b>Event title</b>	Catching fish			<b>Location of Event</b>	Clutha River		
<b>Person in Charge</b>	Hay, Elizabeth	<b>Code</b>	HY	<b>Approximate cost per student</b>	16.8		

<b>Term</b>	Term 2 Hols	<b>Time Period</b> Tick all that apply	Period	<input checked="" type="checkbox"/>	<b>Staffing</b> Tick all that apply	Teachers	<input checked="" type="checkbox"/>	<b>Outside Contractor</b> Aires, Roger
<b>Week</b>	Week 3		Half day	<input checked="" type="checkbox"/>		Parents	<input checked="" type="checkbox"/>	
<b>Curriculum Area(s)</b>	History		School hours	<input checked="" type="checkbox"/>		Volunteers	<input checked="" type="checkbox"/>	
	Mathematics		Whole day	<input checked="" type="checkbox"/>		Coaches	<input checked="" type="checkbox"/>	
			Evenings	<input checked="" type="checkbox"/>		Contractors	<input checked="" type="checkbox"/>	
	Overnight	<input checked="" type="checkbox"/>	Senior leaders	<input checked="" type="checkbox"/>	<b>Role</b> To fly higher than anyone ever has			
	Multi-day	<input checked="" type="checkbox"/>	Student Teachers	<input checked="" type="checkbox"/>				
	Weekend	<input checked="" type="checkbox"/>	Work Placement	<input checked="" type="checkbox"/>				
	Holidays	<input checked="" type="checkbox"/>						

<b>Type of Event</b> Tick all that apply	Curriculum	<input checked="" type="checkbox"/>	<b>Accommodation</b> Tick all that apply	Motel	<input checked="" type="checkbox"/>	<b>Transport</b> Tick all that apply	By foot	<b>I have entered this event on to the term planner</b> <input checked="" type="radio"/> Yes <input type="radio"/> No <b>The EOTC Coordinator has been informed of this event</b> <input checked="" type="radio"/> Yes <input type="radio"/> No <b>Approved by Principal</b> <input checked="" type="radio"/> Yes <input type="radio"/> No <b>(Signed)</b> <b>Date of approval</b>
	Outdoor Pursuits	<input checked="" type="checkbox"/>		Campingground	<input checked="" type="checkbox"/>		By bikes	
	Spots trip	<input checked="" type="checkbox"/>		Hotel	<input checked="" type="checkbox"/>		By van(s)	
	Club	<input checked="" type="checkbox"/>		Tents	<input checked="" type="checkbox"/>		Staff vehicle(s)	
	Cultural	<input checked="" type="checkbox"/>		Backpackers	<input checked="" type="checkbox"/>		Adults driving cars	<input checked="" type="checkbox"/>
	Arts	<input checked="" type="checkbox"/>		Cabins	<input checked="" type="checkbox"/>		By bus	<input checked="" type="checkbox"/>
	Water	<input checked="" type="checkbox"/>		Billets	<input checked="" type="checkbox"/>		Students driving car(s)	<input checked="" type="checkbox"/>
	Alpine / Bush	<input checked="" type="checkbox"/>		Host families	<input checked="" type="checkbox"/>		Students driving students	<input checked="" type="checkbox"/>
Urban	<input checked="" type="checkbox"/>							

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A second document '1.1 Event Proposal' should be printed at the same time as this requests the signing off of approval in principle. It also includes the signing off of full formal approval. This document may be printed via the fourth button in the left hand column. An example of this is shown below.

Bear in mind, of course, that if the level of risk is very low then you might not even require Approval in Principle.



**Arthur's Academy**

## Event Proposal

# 1.1

### STAGE 1: APPROVAL IN PRINCIPLE

To the teacher in charge:

EITHER ( )

We are satisfied with the proposed planning, organisation and staffing of the EOTC event. We give approval to go ahead and plan the event.

Please ensure that we have all relevant information including: a final list of students, staff and volunteers; details of parental consent; a detailed itinerary (including maps) at least seven days before the group is due to leave.

Your report and evaluation of the EOTC event, including details of any incidents, should be with us as soon as possible but no later than 14 days after the group returns.

OR ( )

We require the following information or specific changes before approval in principle can be given.

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### STAGE 2: FINAL APPROVAL

We are satisfied with the planning for the EOTC event. We give approval for the event to go ahead.

Board of trustees or delegate's name: \_\_\_\_\_

Board of trustees or delegate's position: \_\_\_\_\_

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

## 5.3 Event Approval

The second step, once you've gained 'Approval in Principle' is to go for 'Event Approval'. This requires quite a bit more information. However, as in the case of 'Approval in principle' you need only supply the information which you know is required for this process. The amount of information required will depend on the Level of Risk associated with the event.

There are two screens of information required for full Event Approval and these are accessed via the second and third tabs on the 'Basic details' screen.

The first of these screens is shown below.

**Basic Details for Catching fish**

Approval in Principle | **Event Approval 1** | Event Approval 2 | Other Adults Involved

The details on this and the next screen are required for full Event Approval Next Page

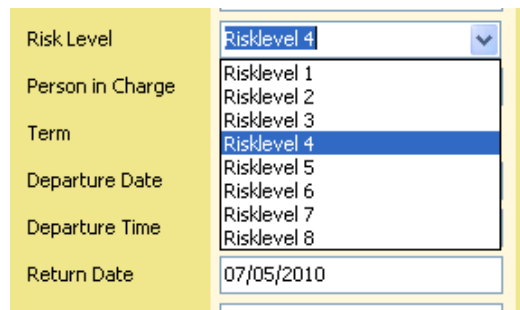
Event title	Catching fish	Purpose of the event	Purpose
Risk Level	Risklevel 4	Details of Programmed Activities	We are going to climb trees and swing from the branches and throw hula hoops at the monkeys
Person in Charge	Hay, Elizabeth		Hazards are detailed under : 'RAMs and SAP' / 'Hazard Assessment and control' Please provide the details via that screen
Term	Term 2 Hols	Details of Hazardous Activities and planning organisation and staff]	We will all be travelling by bike to the depot and then going on foot to the foothills where we will catch a bus before
Departure Date	05/05/2010		Accommodation Arrangements
Departure Time	8.30am	Transport Arrangements (Name of company, drivers, registration numbers)	Financial
Return Date	07/05/2010		
Return Time	4.30pm	Proposed Financial Arrangements	
Duration in hours	46		
Age range	14-15		
Maximum boys	5		
Maximum girls	6		
Maximum students	11		
Adult/Student ratio	1 Adult per 3 students		
Leader/Participant ration	1 Leader per 4 students		
School contact in case of emergency	Cameron, Leslie		
Address of Contact (retrieved from Staff database)	4 John Street, Levin, Manawatu		
Contact Phones (Retrieved from Staff database)	06 345 6789, 021 1234 567		

Print Event Approval form with details

Print ALL Documents required for Event Approval

Some of the details on this screen are 'disabled' – i.e. you cannot type in their data areas. Those areas appeared 'greyed' in the illustration above. The Event Title and Person in Charge both come from the previous screen. The Contact Address and Phones are extracted from the staff area of the database and need not be retyped here.

A very important piece of information is the Risk Level. This is the second item of information on this screen and, by selecting from the list of risk levels (you'll remember that these were set up in Configuration) you determine which of the many documents are required for the event. The required documents will be subsequently available for printing via the 'Documents' button in the buttons column on the left of the screen.



The rest of the information on this screen will be familiar to those organising EOTC events.

There are two buttons in the bottom right hand corner of this screen.

The first will print the 'Event Approval' document which you must then submit to gain formal approval.

The second will generate all of the documents which might be required for full approval.

The second screen for Event Approval (which may be accessed via either the third tab or the 'Next screen' button in the top right hand corner of the current screen) requires further information for full event approval. An example of this screen is shown below.

This screen lists :

- a) The staff involved (selected via a popup list). This includes any 'Other adults' whom you've entered into the 'leaders, Staff and Others' section of the database. This would probably include caregivers who regularly provide assistance with EOTC programmes.
- b) Other adults involved. These are presumed to be students' caregivers. These can be selected from the fourth tab – as described shortly.
- c) Up to two outside providers. These will be contractors or organisations listed

in the 'Leaders, Staff and Other adults' section of the database. Their 'details' are retrieved and displayed on the current screen.

- d) Two other details on this screen ('Specific learning Outcomes and Curriculum Links' and 'Details of students with special educational or medical needs') must be specified via separate screens – which may be accessed via the buttons beside the areas in question.

**Basic Details for Catching fish**

Approval in Principle | Event Approval 1 | **Event Approval 2** | Other Adults Involved

**Note that, according to the level of risk involved, not all section will be relevant to every proposed event**

<b>Staff involved</b> Butler, Rory Crayford, Elizabeth Cameron, Ros Pearson, Carol	<b>Existing knowledge of site</b> Lots of knowledge there	
<b>Other adults involved</b> (Select via the fourth tab) Ms Tania Sladen Mr Peter Dudley Mr Richard Bateup Mrs Lynda Duff Mr Kelvin Duff Mr Graeme Butler Mr Jeff Marr	<b>Previsit to site required</b> <input checked="" type="checkbox"/>	These are specified via a separate screen <a href="#">Go to Specification screen</a> <a href="#">Print</a>
<b>Outside providers involved</b> <b>Outside Provider 1</b> Aires, Roger Address : 4 John Street, Levin Phones : 03 445 6789, 021 345 6789 Contact : Jimmy Caruthers	<b>Specific Learning Outcomes and Curriculum Links</b>	These are specified via a separate screen <a href="#">Go to Specification screen</a> <a href="#">Print</a>
<b>Outside Provider 2</b> Sir Edmund Hillary Outdoor Pursuit Address : 15 feet north, South Face, Mount Everest Phones : 07 654 3212, 021 666 5555 Contact : Edmund Hillary	<b>Names and details of students with special educational or medical needs</b>	

Printing document '2.0 Event Approval' will result in a document similar to that shown below. It will occupy two or more pages depending on the amount of detail you have entered for the Event Approval process. This document should be submitted (if necessary) along with the document 1.1 on which your Approval in Principle was signed off.



Arthur's Academy

## Event Approval

2.0

Event: Catching fish

Person in Charge: Hay, Elizabeth

The PIC should complete this form at the outset of planning for the EOTC activity. The PIC should already have received approval in principle for the proposed activity.

When approval is given, one copy of this form should be retained by the approver and another by the PIC. The principal/board should be informed of any subsequent changes in planning, organisation and/or staffing.

### 1. Purpose of EOTC event

Purpose

### 2. Specific learning outcomes and curriculum links

History  
Mathematics

### 3. Site/s where event will take place

Clutha River

### 4. Dates and times

Date of Departure: 05/05/2010

Date of return: 07/05/2010

Time of Departure: 8.30am

Time of return: 4.30pm

### 5. Transport arrangements: Include names of transport company, volunteer drivers and vehicle registration numbers.

We will all be travelling by bike to the depot and then going on foot to the bothills where we will catch a bus before flying by helicopter to the edge of the bush.

### 6. Details of outside provider/s to be used in the EOTC activities (if any).

Contractor: Aires, Roger  
Address: 4 John Street, Levin  
Phone: 03 445 6789 021 345 6789

Contractor : Sir Edmund Hillary Outdoor Pursuits Centre (Organisation)  
Address : 15 feet north, South Face, Mount Everest  
Phone : 07 654 3212 021 666 5555

**7. Proposed cost and financial arrangements.**

Financial

**8. Details of programmed activities.**

We are going to climb trees  
and swing from the branches  
and throw hula hoops at the monkeys

**9. Details of any hazardous activity and the associated planning, organisation and staffing (please attach RAMS or SAP or similar form/s).**

(See attached)

**10. Names, relevant experience, qualifications and specific responsibilities of staff accompanying the group.**

Butler, Rory  
Crayford, Elizabeth  
Cameron, Ros  
Pearson, Carol

**11. Names, relevant experience, qualifications and specific responsibilities of other adults accompanying the party.**

Ms Tania Sladen(990157)|Mr Peter Dudley(990157)|Mr Richard Bateup(984301)|Mrs Lynda Duff(983338)  
|Mr Kelvin Duff(983338)|Mr Graeme Butler(983970)|Mr Jeff Mann(984074)|Mrs Philippa Avery(983912)|Mrs  
Denise Aitken(990017)|

**12. Name, address and telephone number of the school contact person who holds all information about the EOTC event in case of emergency.**

School contact : Cameron, Leslie  
Address : 4 John Street, Levin, Manawatu  
Phone : 06 345 6789 021 1234 567

**13. Existing knowledge of EOTC event site and whether a pre-visit is intended.**

Lots of knowledge there

**14. Size and composition of the group:**

Age range : 14-15

---

Maximum number of males: 5	Maximum number of females: 6
Activity leader/participant ratio: 1 : 4	
<b>15. Information on parental consent:</b>	
Consent may precede or follow approval. Please attach copy of information being sent to parents and the parental consent form.	
(See attached)	
<b>16. Names and brief details of students with special educational or medical needs:</b>	
(See attached)	
Teacher in charge full name: Hay, Elizabeth	
Signed: _____	Date: _____

## 5.4 Other adults involved

Frequently, students' caregivers will attend EOTC events and the fourth tab on the 'Basic details' screen allows you to select these.

The screen appears as shown below. (Names have been 'hidden')



**Basic Details for Catching fish**

Approval in Principle | Event Approval 1 | Event Approval 2 | **Other Adults Involved**

**Parents and Caregivers involved**

Select from ☒ students involved in this event ☐ all students

Student / Caregivers	Caregivers selected
Aiken, Jes	Ms Ta den
Aitken, Se	Mr Pe lley
Adcock, B	Mr Ric ateup
Adcock, K	Mrs Ly Jff
Adam, Jar an	Mr Ke if
Ms Tar m	Mr Gr utler
Mr Peti m	Mr Jel
Alesana, "	Mrs Pl Avery
Mrs Ta sana	
Mr Son sana	
Avery, Ja	
Mrs Ph ivery	
Mr Clar y	
Bakkum, k	
Thorpe i	
Thorpe a	
Barnes, M	
Bateup, Ji	
Mrs Jul eup	
Mr Rich ateup	
Bay, Harri	
Mr ReE lay	
Mr RoC y	
Barnes, Stuart	

Save selection

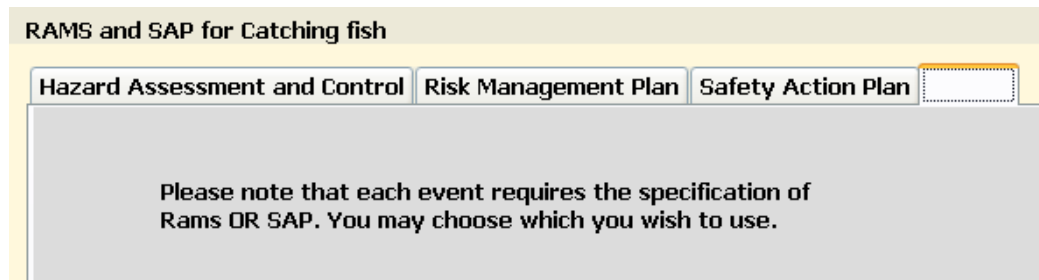
If you have already attached students to this event (which you probably will NOT have done) then they and their caregivers will be listed to allow you to select caregivers. If NO students have yet been attached then ALL students with caregivers will be listed to allow you to select the relevant caregivers.

You can switch backwards and forwards between ALL students' caregivers and JUST THOSE ATTENDING's caregivers using the two option buttons at the top of the screen.

Once you have finished selecting caregivers click on the button labelled 'Save selection'. (OK, so here is one place where there IS a 'save changes' button. I didn't want to annoy the database by updating it every time you make a selection).

## 5.5 RAMS and SAP

Clicking the second button down on the left hand button panel leads you to this screen.



**RAMS and SAP for Catching fish**

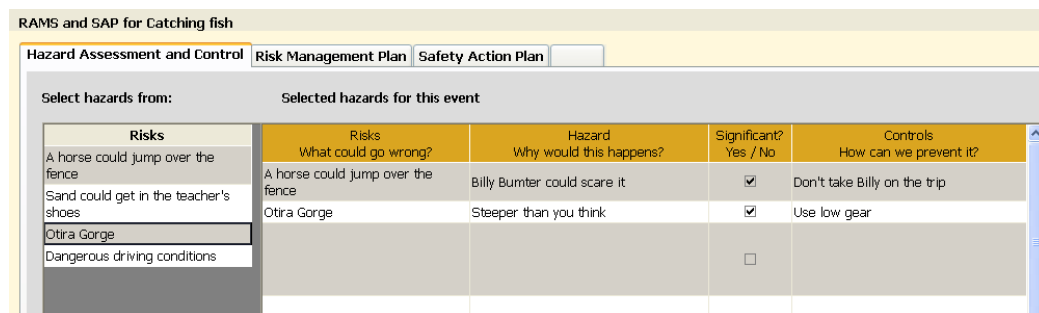
**Hazard Assessment and Control** Risk Management Plan Safety Action Plan

Please note that each event requires the specification of Rams OR SAP. You may choose which you wish to use.

As the message indicates you should elect to use either a Risk Analysis and Management System (RAMS) or a Safety Action Plan (SAP) – bearing in mind that it's quite possible that low-risk events will require neither.

The tab control has three tabs from which to choose.

### a) Hazard Assessment and Control



**RAMS and SAP for Catching fish**

**Hazard Assessment and Control** Risk Management Plan Safety Action Plan

Select hazards from:

Risks	Selected hazards for this event			
	Risks What could go wrong?	Hazard Why would this happens?	Significant? Yes / No	Controls How can we prevent it?
A horse could jump over the fence	A horse could jump over the fence	Billy Bunter could scare it	<input checked="" type="checkbox"/>	Don't take Billy on the trip
Sand could get in the teacher's shoes	Otira Gorge	Steeper than you think	<input checked="" type="checkbox"/>	Use low gear
Otira Gorge			<input type="checkbox"/>	
Dangerous driving conditions				

You will remember that, under Configuration, you were able to list potential hazards which might occur during EOTC events. These will be listed down the left hand side of the screen and you may select those which apply to this event by clicking on them. They will subsequently be displayed in the table on the right hand side of the screen – as shown above, where two of the three have been selected.

To delete a hazard which has already been selected just select it again and you will be given the opportunity to remove it from those selected.

## b) Risk Management Plan

The screenshot shows a software window titled "RAMS and SAP for Catching fish". It has four tabs: "Hazard Assessment and Control", "Risk Management Plan" (which is selected), "Safety Action Plan", and an unlabeled tab. Below the tabs, there is a text box that says: "Select those factors which apply to this event under each of the various categories. (The possible entries have been set up under Configuration)." Below this text box is another set of tabs: "Risks", "People", "Equipment", "Environment", "Transport", "Critical Incident Management", and "Other details". The "Risks" tab is selected. Below the "Risks" tab, there is a heading "Enter any Risks (significant potential losses)". Under this heading is a list box with a scroll bar. The list box has a header "Risk" and contains the following text entries: "In a logging area so trees might fall on us", "Pihrana could be in the lake", and "Wild crocodiles abound". There are several empty rows below these entries.

This screen has several tabs as there are several aspects of the RAMS.

### i) Risks

The first is already displayed. The Risks screen allows you to record any specific extra risks which you believe could operate during this event.

### ii) People

This screen displays the people factors which you set up in Configuration.

As you select each factor it will be added to the list of selections on the right hand side of the screen. Each may occur more than once – if you have provided more than one strategy for a particular risk factor.

You can edit individual selected factors and strategies. Double click on an

**RAMS and SAP for Catching fish**

**Hazard Assessment and Control** **Risk Management Plan** **Safety Action Plan**

Select those factors which apply to this event under each of the various categories.  
(The possible entries have been set up under Configuration).

**Risks** **People** **Equipment** **Environment** **Transport** **Critical Incident Management** **Other details**

**Select People RAMS from :**

Factor	Selected People RAMS
Lack of participant knowledge	Lack of staff/leader training
Lack of staff/leader training	Training of staff/leaders/volunteers in RM of activity
Lack of adequate briefing	Lack of staff/leader training
Inappropriate programming or sequencing	Training of staff/leaders/volunteers in programming/sequencing
Failure to check site with pre visit	Lack of staff/leader training
Failure to check equipment	Training of staff/leaders/volunteers in site specific procedures
Inadequate intervention	Lack of staff/leader training
Stupidity on site	Instructor/staff NZOIA Bush 1 or equivalent
Failure to disclose risks	Lack of staff/leader training
Accident	Leader has completed RM course
Lack on risk management skills, knowledge and experience	Failure to disclose risks
Participants not involved in risk analysis	Brief participants re risks and hazards
No First Aid, rescue or loss plans	Inappropriate language/behaviour
Inadequate supervision	Brief participants re expectations and rules
Inadequate or inappropriate ratios	Fatigue/stress
Incidents with passers by, other users	Brief participants re expectations and rules
Inappropriate language/behaviour	Fatigue/stress
Pre-existing medical condition	Systems in place (e.g. buddy/distance)
Participants leaving site / becoming lost	Fatigue/stress
Lack of awareness of risks	Tramp within individuals ability
Inappropriate hydration/nutrition	Lack on van driving experience
Fatigue/stress	Employ competent driver
Lack of outdoor skills, knowledge and experience	Blisters
Lack on van driving experience	Carry suitable blister treatment
Lack of knowledge of area	Blisters
Lack of knowledge of weather	Warn students concerning suitable footwear

entry to edit it. You can remove unrequired factor/strategy combinations by right-clicking on the factor or strategy.

iii) Equipment / iv) Environment / v) Transport

Each of these screens operates in the same way as the People Rams screen.

vi) Critical Incident management

You will recall that, under Configuration, you were able to set up up to ten Critical Incidents which you considered might or might not occur during a particular event. This screen is where you select those which you believe are indeed possibilities for the currently displayed event. Those you select will subsequently be included in the document 18.0 RAMS – Risk Management Plan.

**RAMS and SAP for Catching fish**

**Hazard Assessment and Control** **Risk Management Plan** **Safety Action Plan**

Select those factors which apply to this event under each of the various categories.  
(The possible entries have been set up under Configuration).

**Risks** **People** **Equipment** **Environment** **Transport** **Critical Incident Management** **Other details**

**Include in this event** N.B. These management strategies are set up via Configuration / Critical incident management

- ☒ Injury or medical issue
- ☐ Negative psychological/emotional experience
- ☒ Bad Public relations
- ☒ Loss of participant
- ☒ Environmental damage
- ☒ Death of participant/staff/others
- ☒ Prosecution / Civil action

vii) Other Details

This screen lists the documents relating to National Standards and Policies and Guidelines and the Core competencies for EOTC along with their desirable personal attributes – all of which you set up as defaults in configuration.

**Hazard Assessment and Control** **Risk Management Plan** **Safety Action Plan**

Select those factors which apply to this event under each of the various categories.  
(The possible entries have been set up under Configuration).

**Risks** **People** **Equipment** **Environment** **Transport** **Critical Incident Management** **Other details**

**Documents and Guidelines** The initial entries here are the defaults set up under configuration but you can change them for this event if you so wish

**National standards applicable**

Safety & EOTC : A good practice guide for New Zealand Schools 2002  
Health and Safety in Employment Act 1992  
Education Act 1989  
Top extra

**Policies and guidelines recommended**

Safety & EOTC : A good practice guide for New Zealand Schools 2002  
Health and Safety in Employment Act 1992  
Education Act 1989  
Top extra

Core Competencies for EOTC are :	Desirable personal attributes include :
Leadership skills	Communication and empathy skills
First aid certification	Flexibility and motivation
Ability to identify and manage risks	Assertiveness and ability to say 'No'
Crisis management skills	Approachability
Environmental awareness skills	Safety conscious
Awareness of cultural values	Sound judgement and problem solving skills
Previous experience in trip/area	Good self concept
Group management skills	Ability to assess group dynamics

You may edit the default entries on this screen – removing some if necessary and adding others.

That's it for the details on RAMS. We now turn our attention to :

### c) Safety Action Plan

This is by far the simplest of the two alternative risk management systems.

Under Configuration you were able to specify entries into your Safety Action Plan. On this screen those entries are listed and you can select those which apply to this event.

RAMS and SAP for Catching fish

Hazard Assessment and Control Risk Management Plan **Safety Action Plan**

Select SAP entries from: Selected Safety Action Plan for this event

SAP entries	What significant things could go wrong?	What would cause it to go wrong?	How could we prevent it from going wrong?	Whose responsibility is it?	When/where will it be done?	Emergency plan
The bicycles might have flat tyres	The bicycles might have flat tyres	Jimmy could have forgotten to pump them up	Watch Jimmy like a hawk	Jimmy Barnes	Outside cycle surgery	Jenny will carry a spare pump
The bicycle bells might not work	The bicycle bells might not work	Lack of oil in the mechanism	Ask Judy to oil them	Jill Usher	Before we leave	Jenny will carry spare oil

## 5.6 Attach Students

Once your event has been given its initial properties you may attach students via the 'Attach Students' button. This causes the following screen to be displayed. (Student names have been hidden....)

Students attached to Catching fish

Select students from this list:  
(Reselect to deselect)

Name	Year	Class
Adz	an	11
Adz		11
Adc		13
Adc		11
Adc		8
Aike	a	9
Aiki		11
Aitk		11
Aitk		9
Akk	Sarunthor	11
Ale:		12
Ale:	isha	12
Alfe		8
Alfe		10
Allc		13
Alle		10
Alls		12
Alv...		9

Click on a year or class to display just those students

Select displayed students

☒ Attach students ☐ Attach student helpers

Name	Year
Adz	11
Adc	13
Adc	11
Aike	9
Aitk	9
Ales	rani
Ave	is
Bak	
Bar	
Bab	il
Bay	
Bay	d
Driv	
Duf	iret
Edd	xander
Fitz	t
Fitz	slicity

Name	Year
Bai	False
Bal	ana

Remove all students Remove all helpers

Save selections

This list on the left initially displays all students. Should you wish to select from just

---

those in e.g. year 11 or class 9/G then click on the required year level or class and those not matching your selection will be hidden. You can return to the full display by clicking on a button at the top of the left hand list labelled 'Display all'. This button will not be visible unless a year level or class display has been selected.

To add a student to the event just click on their name in the left hand list. They will be added to either the list of students or the list of student helpers on the right hand side of the screen. You can determine which list they will be added to by selecting from the two option buttons above the two lists.

You can remove a selected student by right-clicking on their name.

The purpose of each of the other buttons on the screen is explained via their label.

## 5.7 Documents

There are between zero and thirty-something standard documents which you may print relating to the event. Which documents are required for a particular event depends on the 'Level of Risk' you have associated with the event. You will remember that, in Configuration, you specified which documents were required for each level of risk.

Click on the 'Documents' button and a list of the documents will be displayed as a set of documents. In the illustration below ALL documents are shown.

The documents are split into three groups.

- a) The group on the left are documents which relate to the event itself. Only one copy of each of these is required. You MAY, if you so wish, click on the tick box to request a 'blank' document. The resulting printout will have no event-specific data included.
- b) The next group are those relating to the students attending the event. The number of students attached has been checked and the number of copies requested is set to this number. This will result in one copy of the document for each student attached – generally including details relating to each of the students.
- c) The final group of documents relates to the adults associated with the event – be they staff members or outside providers (e.g. contractors and/or organisations). The number of copies required has been determined (by



checking the data you have entered for the event) and this is offered at the top of the screen. This will result in a separate document for each 'adult' including information peculiar to each.

**Event documents for Tree Climbing**

Event-specific documents			Student Documents		Staff/Contractor documents	
Print <input type="text" value="1"/> copies	Print <input type="checkbox"/> Blank form		Print <input type="text" value="5"/> copies	Print <input type="text" value="1"/> copies		
1.0 Event Approval in Principle	20.1 Participants / Medical Data	25.2 Media Wallet Cards 2	5.0 Blanket Consent	12.0 Activity Leader		
1.1 Event Proposal	21.0 Event Phone Numbers	26.0 Report and Evaluation	6.0 Parental Consent	13.0 Volunteer Assistant Agreement		
2.0 Event Approval	22.0 Venue/Facility Safety	27.0 Leader Logbook	7.0 Student Health Profile	14.0 Contracting Checklist		
3.0 Event Planning Check List	23.0 Transport Safety 1	28.0 Equipment Log	8.0 Medications Administered	15.0 School/Provider Agreement		
4.0 Information for Parents and Caregivers	23.1 Transport Safety 2	29.0 Injury Report Form	9.0 Health Care Plan	16.0 Outside Provider		
17.0 RAMS : Hazard Management	23.2 Transport Permission Slips	29.1 Injury Report Details	10.0 Aquatic Consents			
18.0 RAMS : Risk Management Plan	23.3 Transport Risk Management	30.0 NID Report Form	11.0 Student Contract			
19.0 Safety Action Plan	24.0 Self Audit Checklist	31.0 First Aid Kit A				
		Kit B				
		Kit C				
20.0 Participant Summary	25.1 Media Wallet Cards 1	32.0 Event and Staff Register				

Examples of each of the documents are included in an appendix.

## 5.8 Student Strengths

This screen allows you to record details relating to the strengths (in nominated areas) of the students attending the event.

On the screen below you will see the default strength areas listed down the left hand side of the screen and across the page there is a separate column for each of the students attached to the event.

A 'Dots' button at the top of the 'Criteria' column allows you to edit the list of criteria and a button at the bottom of the screen allows you to record the currently displayed set of criteria as the default set for other future events.

### Student Strengths for Tree Climbing

During an event each student may be assessed against various criteria. Specify the criteria required for this event below. Results may be entered against each student or via the global entry process on this screen. (Students will not be visible here until they have been attached via the 'Students' button on the left.) \* = Student helper

Criteria	...	Adrian J. Williams	Alanna Harris	Adrian Pryor	Milliken Zoe	Alanna Harris
Self-confidence	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Creativity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Faith and trust in others	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Physical endurance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sense of humour	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Commitment to my values	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hard work	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Stability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Courage	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Independence	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Honesty	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Loyalty to others	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Commitment to others	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Flexibility	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Acceptance of others	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assertiveness	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Empathy with others	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Inner security	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Self_discipline	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Open_mindedness	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Acceptance of events	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Save these criteria as default  
strengths for other events

## 5.9 Student Roles

Similar to that for 'Strengths' this screen allows you to record

**Task Roles and Socioemotional Roles for Tree Climbing**

During an event each student may be assessed against various criteria. Specify the criteria required for this event below. Results may be entered against each student or via the global entry process on this screen. (Students will not be visible here until they have been attached via the 'Students' button on the left.) \* = Student Helper

Criteria	Assess Je in	Assess nona	Assess eniger	Assess zou	All ia
- Task Roles	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- Initiator contributor	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- Information seeker	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- Opinion seeker	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
- Information giver	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- Opinion giver	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
- Elaborator	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- Coordinator	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- Orienter	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- Evaluator-critic	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
- Energiser	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- Procedural	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
- Recorder	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- Process Roles	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- Encourager	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
- Harmoniser	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- Compromiser	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- Gatekeeper and expedit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- Standard setter	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- Group Observer and cc	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- Follower	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- Anti-group Roles	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- Blocker	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- Recognition seeker	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- Dominator	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- Avoider	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- Sabotager	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Save these criteria as default roles for other events

On the screen above you will see the default role criteria listed down the left hand side of the screen and across the page there is a separate column for each of the

students attached to the event.

A 'Dots' button at the top of the 'Criteria' column allows you to edit the list of criteria and a button at the bottom of the screen allows you to record the currently displayed set of criteria as the default set for other future events.

## 5.10 Senior leader Evaluation

Student helpers may be subject to evaluation too! This screen allows you to

- Select a particular student from the list on the left
- Enter a 1 to 5 ranking for each of the criteria
- Enter a comment concerning this student at the bottom of the screen.

**Senior Leader Evaluation for Catching fish**

Select a senior student from the list and record his or her scores on the chart. The final chart enter is a comment area.

Student : Ba or Rating scale : 1 = low 5 = high

Criteria	1	2	3	4	5
Cooperation					
- Acceptance of responsibility					
- Relationship with staff					
- relationship with peers					
- Relationship with Juniors					
- Initiative					
- Willingness to participate					
Leadership					
- Consistency					
- Self Discipline					
- Respect for others					
- Maturity					
- Facilitation skills					
Attitude					
- Punctuality					
- Enthusiasm and positiveness					
- Determination					
- Confidence					
Empathy					
- Concern for students					
- Rapport					
- Openness and Receptiveness					
Safety standards					
- Safety standard					
Communication skills					
- Briefing					
- Debriefing					
- Questioning skills					
- Showing recognition for individuals and					
Overall contribution					

Comment: Yep, this is a comment and there is more.

## 5.11 Event report and Evaluation

Now we come to the process of reporting on the completed event.

There are two areas, each accessed via one of the tabs across the top of the screen.

### a) Curriculum Areas and Outcomes

The numbers of Teachers, Students, Volunteers and Nights along with a couple of transport details and costs are required for the final report. These are in the upper part of the screen – shown below

The lower half of the screen is devoted to the Curriculum Areas and associated Learning outcomes (though those below are spurious...) and a column of tick boxes to indicate whether or not they were achieved.

**Report and Evaluation for Catching fish**

**Curriculum Areas and Outcomes** **Item Ratings**

**Staffing Numbers and Distance Travelled**

Teachers	<input type="text" value="3"/>	Volunteers	<input type="text" value="2"/>	Transport used	<input type="text" value="3 student cars and 2 staff cars"/>
Students	<input type="text" value="15"/>	Nights	<input type="text" value="2"/>	Distance Travelled	<input type="text" value="57 km each way"/>
Costs	<input type="text" value="No extra costs were experienced"/>				

Curriculum areas	Learning outcomes	Achieved?
Nature study	Can count butterflies	<input checked="" type="checkbox"/>
Water study	Can spot frogs	<input checked="" type="checkbox"/>
Hill study	Can climb hills	<input checked="" type="checkbox"/>
Train study	Can spot trains	<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>

### b) Item Ratings

There are ten items each of which you can rank on a 1-9 scale and provide a comment. (Those in the example below are spurious of course).

Report and Evaluation for Catching fish		
Curriculum Areas and Outcomes		Item Ratings
Item	Rating 1 = low 10=high	Comment
1. Pre-event organisation	9	Splendid
2. Objectives met	7	Amazing
3. Travel arrangements	6	Stupendous
4. Instruction	5	Inspirational
5. Equipment	6	Wonderful
6. Suitability of venue	7	Excellent
7. Accommodation	8	Far out
8. Food	9	Outstanding
9. Evening activities	8	Unbelievable
10. Other	9	Extraspecial

## 5.12 Incidents Log

Unfortunately, inevitably, from time to time incidents will occur and these need to be documented. The incidents screen may be used to record multiple incidents for an event.

There are four tabs per incident :

- Incident details
- People involved
- Narrative and days
- Follow up

These are accessed by clicking on the tabs across the top of the incidents screen.

To record a new incident click on the button labelled 'New Incident' and fill in the details.

- a) The first tab – Incident Details

**Incidents associated with Catching fish**

3 05/05/2009 Clutha River  
4 05/05/2009 Clutha River

New incident  
Delete displayed incident  
Print incident details

Note re Privacy : Information collected is for the purposes of :  
a) Identifying incident trends  
b) Informing safety management policy  
c) Improving safety management procedures

Details will be kept confidential to school management and Ministry staff responsible for EOTC. Schools and individuals will not be identified in any data analysis reports.

Incident details | People involved | Narrative and days | Follow Up

**a) Event Details**  
Incident No. : 3    Event : Catching fish    Dates : 05/05/2010 - 07/05/2010    TIC : Hay, Elizabeth    Location : Clutha River

**b) Nature of the Incident**  
Location: Fast Food outlet    Date: 05/05/2009    Time: 2.40pm    Severity: Severity rank 3    Help

Type (tick those which apply)    ☐ Injury    ☐ Incident    ☐ Equipment damage    ☐ Emotional or psychological damage  
☐ Accident    ☐ Near Accident    ☒ Illness    ☐ Death    ☐ Environmental damage

**c) Weather and Programme type**  
☒ Temperature    ☐ Precipitation    ☒ Wind    Comment: I warned them about those chicken nuggets!  
☐ Clouds    ☐ Visibility    Programme type: Visit to fast food outlet

**d) Type of Illness / Injury**  
☐ Abrasion    ☐ Laceration/cuts    ☐ Strain    ☒ Gastrointestinal    ☐ Allergy    ☐ Fever/Flu  
☐ Burn    ☐ Fatigue    ☐ Cold injury    ☐ Respiratory    ☐ Cardiac    ☐ Dermatitis  
☐ Concussion    ☐ Puncture    ☒ Hypothermia    ☐ Asthma    ☐ Menstrual    ☐ Other  
☐ Bruising    ☐ Sprain    ☐ Hyperthermia    ☐ Infection    ☐ Urinary

**e) Activity being taken at the time**  
☐ Factory visit    ☐ Swimming pool    ☐ Art gallery    ☐ Marae    ☐ Work shadow    ☐ Other  
☐ Heavy industrial site    ☒ Other school    ☐ Restaurant    ☐ Sports ground    ☐ Travel  
☐ Production line    ☐ Tertiary visit    ☒ Fast food    ☐ Stadium    ☐ Vehicle  
☐ Retail shop    ☐ Museum    ☐ Accommodation    ☐ Farm    ☐ Work placement

In the top right hand corner there is a 'Help' button which, when clicked, reveals the following screen which provides a full description of each of the 10 Incident severity levels.

Details of Incident Severity Ranking						
Rank	Group Descriptor	Description of Injury	Description of Illness	Description of Equipment Damage	Description of Environmental Damage	Description of Psychological or Emotional Damage
1	Minor or short term impact on individual(s) that doesn't have a large effect on their participation in the programme	Splinters, insect bites, stings	Minor irritant	Minor cost	Littering	Temporary embarrassment
2		Sunburn, scrapes, bruises, minor cuts	Minor cold infection	>\$50	Minor damage to the environment that will quickly recover	Temporary embarrassment with peers
3		Blisters, mild hypo/hyperthermia, minor sprain, minor dislocation	Minor asthma, cold, upset stomach, etc	>\$100	Scorched campsite, plant damage	Shown up in front of the group
4	individual(s) that may prevent participation in the programme	Lacerations, frostnip, minor burns, mild concussion	Mild flu, migraine	>\$500	Burnt shrubs, cut live branches to burn, washed group dishes in stream etc	Does not want to participate again in this session
5	Major impact on individual(s) that would mean they were unable to continue with large parts of the programme	Sprains and hyperextensions, mod hypo/hyperthermia	Flu, gastroenteritis, vomiting	>\$2000	Walked through sensitive ecological area destroying some plant life	Wants to leave group, a lot of work to bring back in
6		Fractures, dislocations, frostbite, major burn	asthma attack, serious infection, medical treatment	>\$8000	Destroyed/killed some examples of flora/fauna	Leaves group and requires onsite counseling
7		Arterial bleeding, severe hypo/hyperthermia	illness causing loss of consciousness, serious medical	>\$20,000	Killed, destroyed or polluted small area of the environment	Therapy, counseling required by a professional
8	Life changing effect on individual(s) or death	Spinal damage, major concussion, major head injury	Major illness requiring hospitalisation	>\$50,000	Killed examples of protected species	Long term therapy required after incident
9		Single death	Single death	>\$250,000	Fire or pollution etc resulting in area of wilderness being destroyed	side because of incident
10		Multiple fatality	Multiple fatality	>\$1,000,000	Major fire or pollution causing serious loss to environment or life	Multiple fatality

b) The second tab – People involved

On this tab select the person or persons involved in the incident from the list of those who attended.



The screenshot shows the 'People involved' tab of the software. It is divided into two main sections: 'Person in charge' and 'Person(s) involved in the incident'.

**Person in charge**

Name: Jamieson, Rosemary  
Gender: Female  
Age: 38  
Position: Not stated

**Person(s) involved in the incident**

Select from those attending

Name	Year
Hayden	TIC
Ms. den	Staff
Mr F. dley	Staff
Mr F. ateup	Staff
Mrs. uff	Staff
Mr k. ff	Staff
Mr C. utler	Staff
Mr. i.	Staff
Mrs. Avery	Staff
Mrs. vitken	Staff
Ada...	11

Person(s) involved in the incident (Right-click on Name to remove)

Name and Address	Gender / Age and Phone
Christie Rogers	4 John Street, Levin, Me
Age : Gender : Female	06 345 6789, 021 112 2
Elinor in	2 Barcelona Place, Broml
Age : 19 Gender : Female	981 9134

c) The third tab – Narrative and days

On this tab you can record full details of the incident.

The screenshot shows the 'Narrative and days' tab of the software. It contains a 'Days lost' section and a large text area for notes.

**Days lost**

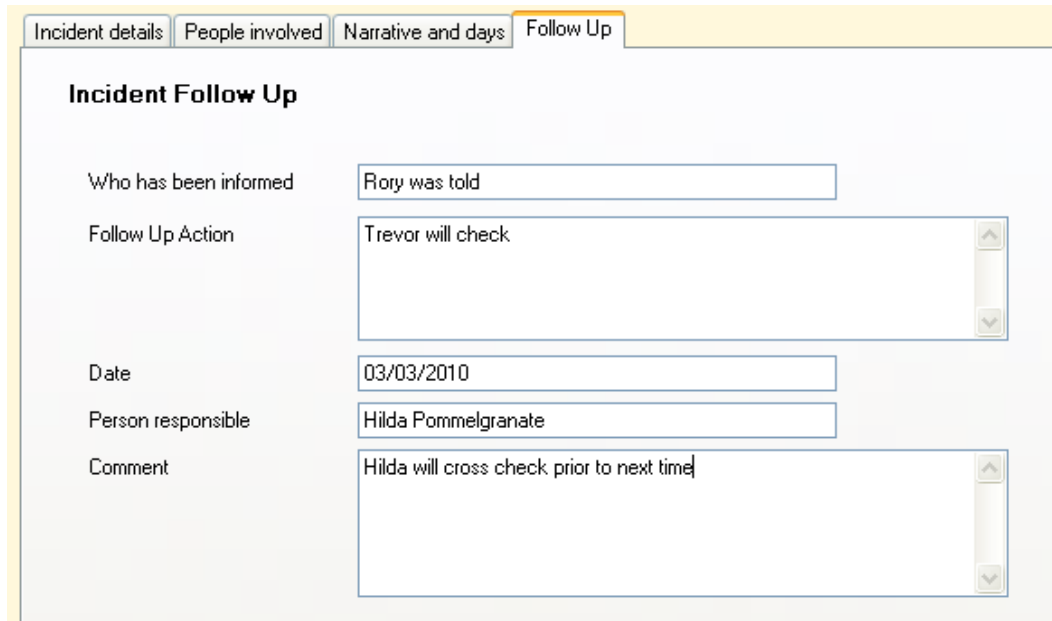
Number of days lost: 3 ☒ The incident ended participation for the person(s) listed below

These are the notes concerning the incident...

d) The fourth tab – Follow up

This is where you can keep a track of the various follow up details.

---



The screenshot shows a software interface with a yellow header bar containing four tabs: 'Incident details', 'People involved', 'Narrative and days', and 'Follow Up'. The 'Follow Up' tab is selected and highlighted. Below the tabs, the title 'Incident Follow Up' is displayed. The form contains several input fields with the following data:

Field	Value
Who has been informed	Rory was told
Follow Up Action	Trevor will check
Date	03/03/2010
Person responsible	Hilda Pommelgranate
Comment	Hilda will cross check prior to next time

All of the above information is included in the Incident documentation.

### 5.13 Send Emails

The final button accesses a screen via which you can send emails to various groups of people associated with the event.

The three groups of people who can have email addresses are ;

- Students
- Staff and Adults
- Contractors and organisations

Each of the people in each of the groups is listed along with their email if recorded in the database. At the bottom of each list is a button which enables you to select all of those in the list who DO have email addresses (Names have been hidden)

**Sending emails relating to Catching fish**

Students		Staff and adults		Contractors	
Name	Email	Name	Email	Name	Email
Ac	jimmy@ytra.co.nz	Butler, Rory	randcbutler@inspi	Aires, Roger	barbara.aires@we
Ac	an	Cre	abeth	Sir Edmund Hillary Ourd	sired@xtra.com.nz
Ac		Car	rc@theschool.schc		
Ail	nine	Pe	il		
Ait	sarah.aitken@ytra	Ms	en		
Alk	ia Puanani ti@yehah.com	Mr	ey		
Av	s Francis	Mr	teup		
Ba		Mrs	ff	lynda@wonderwor	
Ba	yla	Mr		kelvin@superhero	
Ba	me Paul	Mr	itler		
Ba		Mr			
Ba	irt Lloyd	Mrs	very		
Dr	ane	Mrs	ken		
Du	Margaret				
Ed	uy Alexand				
Fit	ec Kurt				
Fit	essa Felicity				
Ba	ebain@ytra.co.nz				
Ba	ana				

De-select all contractors with emails

Select those email addresses to whom you wish to send an email and click the 'Proceed to email dialogue' button below.

An email dialogue will appear via which you can specify your message.

Please note that a separate email will be sent to each of the selected addresses

Proceed to email dialogue

Clicking all of the buttons results in a display, for example :

**Sending emails relating to Catching fish**

Students		Staff and adults		Contractors	
Name	Email	Name	Email	Name	Email
Ad	jimmy@ytra.co.nz	Butler, Rory	randcbutler@inspi	Aires, Roger	barbara.aires@we
Ad	brogan@ytra.co.n	Cre	abeth	Sir Edmund Hillary Ourd	sired@xtra.com.nz
Ad		Car	rc@theschool.schc		
Alk	e	Pe	il		
Ait	sarah.aitken@ytra	Ms	en		
Alk	uanani ti@yehah.com	Mr	ey		
Av	rancis	Mr	teup		
Bal		Mrs	ff	lynda@wonderwor	
Bar		Mr		kelvin@superhero	
Ba	Paul	Mr	itler		
Ba		Mr			
Ba	Lloyd	Mrs	very		
Dr		Mrs	ken		
Du	rgaret				
Ed	Alexand				
Fit	Kurt				
Fit	a Felicity				
Ba	ebain@ytra.co.nz				
Ba					

De-select all contractors with emails

Select those email addresses to whom you wish to send an email and click the 'Proceed to email dialogue' button below.

An email dialogue will appear via which you can specify your message.

Please note that a separate email will be sent to each of the selected addresses

Proceed to email dialogue

When you are ready to proceed click on the button labelled 'Proceed to email dialogue' and the usual email dialogue will appear on which you can type your message and send.

**Send email**

To \*

Multiple Recipients

Please note that multiple addresses must be separated by either commas or semi-colons. Please also note that a separate email will be sent to each recipient.

Subject \*

Message \*

Attachment

\* Required



# ***Chapter 6***

## **The Printing Utility**

What's in this chapter?	Page
6.1 Overview	6.1
6.2 Lists	6.6
6.3 Calendar	6.6
6.4 Document Design	6.8
6.5 Document Printing	6.18

### **6.1 Overview**

Education Outside the Classroom involves a lot of documentation. The package comes with over forty predesigned documents (or versions of documents) You can view samples of each of these documents from within the program by visiting Configuration / Levels of Risk / Attached Documents and then clicking on the 'View' buttons in the table on the right hand side of the screen.

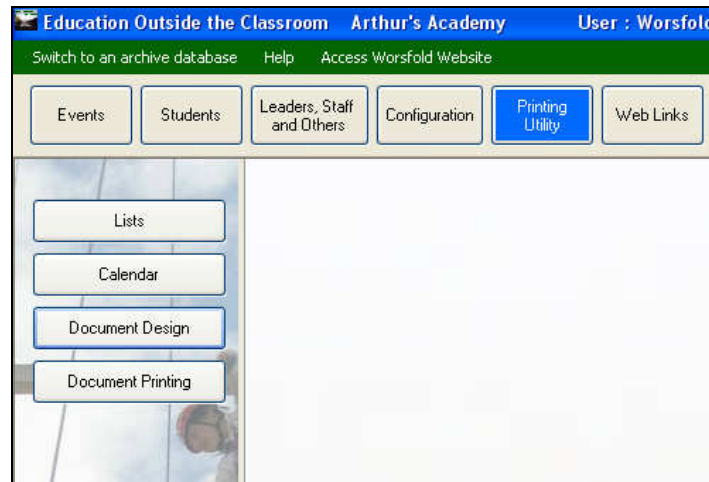
The same example of each of these documents is presented in an appendix to this document.

This chapter deals with the processes involved in printing lists, printing calendars and the design and printing of documents. There are two types of documents you can design and print. The Official documents have all been designed for you and are

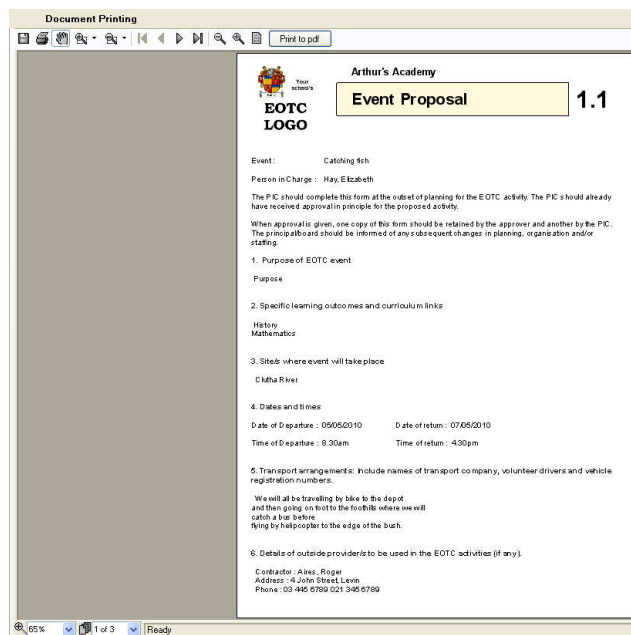
included in the package. You can, if you so wish, use the document design process to edit and alter these documents.

In addition to the official documents you may also design your own unofficial documents.

The main printing screen on first entry appears as shown below.




In every case when you request to have a list generated it will be presented to you on a preview screen such as that shown below.



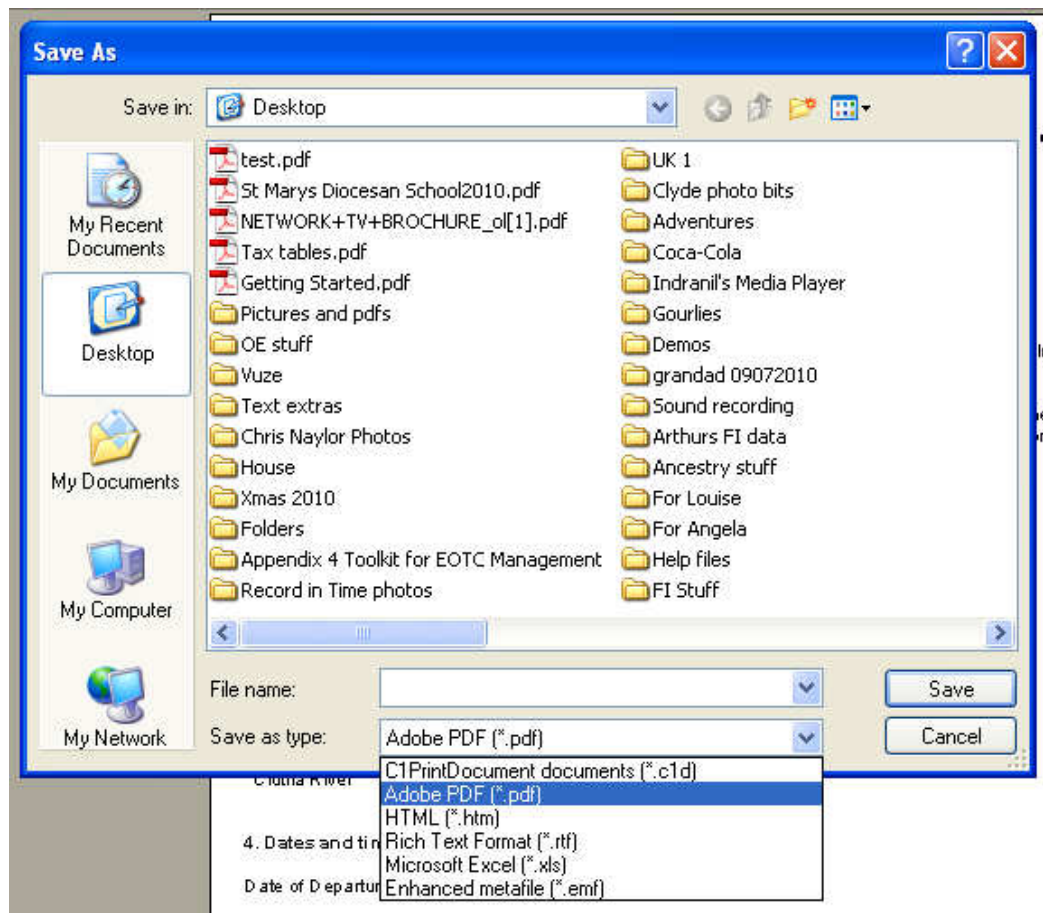
There are various controls presented on the preview screen. Those along the top are :



### Save the document to file

The first button  provides you with the ability to save your document to a file.

In particular, one of the options is to save it as a pdf file. When you click on the button a dialogue such as that shown below is presented.





As an example I've selected 'Adobe PDF'. Give the file a name and navigate to where you wish to have it saved then click 'Save'. The file will be generated and can later be viewed or emailed to someone.

test.pdf - Adobe Reader

File Edit View Document Tools Window Help

1 / 3 64.9% Find

**Arthur's Academy**

**EOTC LOGO**

**Event Proposal 1.1**

Event : Catching fish

Person in Charge : Hay, Elizabeth

The PIC should complete this form at the outset of planning for the EOTC activity. The PIC should already have received approval in principle for the proposed activity.

When approval is given, one copy of this form should be retained by the approver and another by the PIC. The principal/board should be informed of any subsequent changes in planning, organisation and/or staffing.

**1. Purpose of EOTC event**

Purpose

**2. Specific learning outcomes and curriculum links**

History  
Mathematics

**3. Site/s where event will take place**

Clutha River

**4. Dates and times**

Date of Departure : 05/05/2010 Date of return : 07/05/2010  
Time of Departure : 8.30am Time of return : 4.30pm

**5. Transport arrangements: Include names of transport company, volunteer drivers and vehicle registration numbers.**

We will all be travelling by bike to the depot and then going on foot to the foothills where we will catch a bus before flying by helicopter to the edge of the bush.

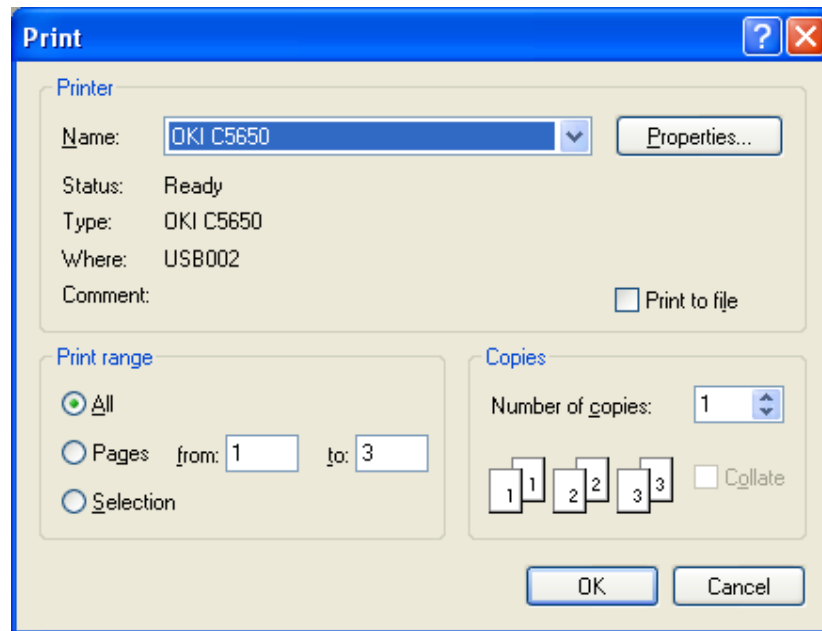
**6. Details of outside provider/s to be used in the EOTC activities (if any).**

Contractor : Aires, Roger  
Address : 4 John Street, Levin  
Phone : 03 445 6789 021 345 6789

Print the document



This button is the one you've been looking for. It sends the previewed document to the printer. You'll receive the usual printing dialogue – which allows you to change printers and set printing properties.



Zooming



The next two buttons are used to enlarge or to reduce the image on the preview screen. To use either of these buttons click on your choice and then click on the document.

Move between pages



The next four buttons allow you to move backwards and forwards between the multiple pages of your previewed document. The four buttons are ;

- Move to the first page
- Move to the previous page
- Move to the next page

- Move to the last page

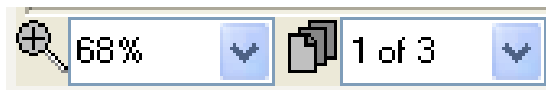
Preview in normal size 

This button instantly enlarges the document to 100% - it's normal preview size. Initially the mode is set to display the full page in the preview window.

Print to PDF 

Before I realised that you could print to a pdf file via the 'Save' dialogue I built in this separate button to allow you to do so directly.

And, at the bottom of the preview screen :



These two displays indicate :

The degree of enlargement of the current display

The page currently being viewed 'of' the total number of pages.

OK, now that you are familiar with the document previewing screen, let's proceed to the various document generation processes.

## 7.2 List Printing

At the time of writing there are no lists yet designed to print. This utility will be expanded as requests from school for specific lists are received.

## 7.3 Calendar Printing

This option allows you to print a calendar for events for nominated months.

The initial screen asks you to select the month or months required and whether or not you wish to include staff members involved as shown below.

Select the month(s) to be included

January  
 February  
 March  
 April  
 May  
 June  
 July  
 August  
 September  
 October  
 November  
 December

☒ Include staff members involved

Generate calendar

Make your selection and click 'generate' to have the calendar printed.

Calendar Printing

Print to pdf

### Arthur's Academy Event Calendar

11/03/2010

Time of Departure	Time of Return	Event	Location	Teacher in Charge	Other adults involved
9am		Tree Climbing	Wanaka Rock Wall	Cameron, Ros	Rogers, Christine (Volunteer) Mann, Sally () and more

12/03/2010

Time of Departure	Time of Return	Event	Location	Teacher in Charge	Other adults involved
9am		Rock Climbing	Wanaka Rock Wall	Cameron, Ros	

14/03/2010

Time of Departure	Time of Return	Event	Location	Teacher in Charge	Other adults involved
	4.30pm	Rock Climbing	Wanaka Rock Wall	Cameron, Ros	
	4.30pm	Tree Climbing	Wanaka Rock Wall	Cameron, Ros	Rogers, Christine (Volunteer) Mann, Sally () and more

03/04/2010

Time of Departure	Time of Return	Event	Location	Teacher in Charge	Other adults involved
9.00pm		Climbing hills	Dunstan Ranges	Alan Forgie	Alice Murphy

07/04/2010

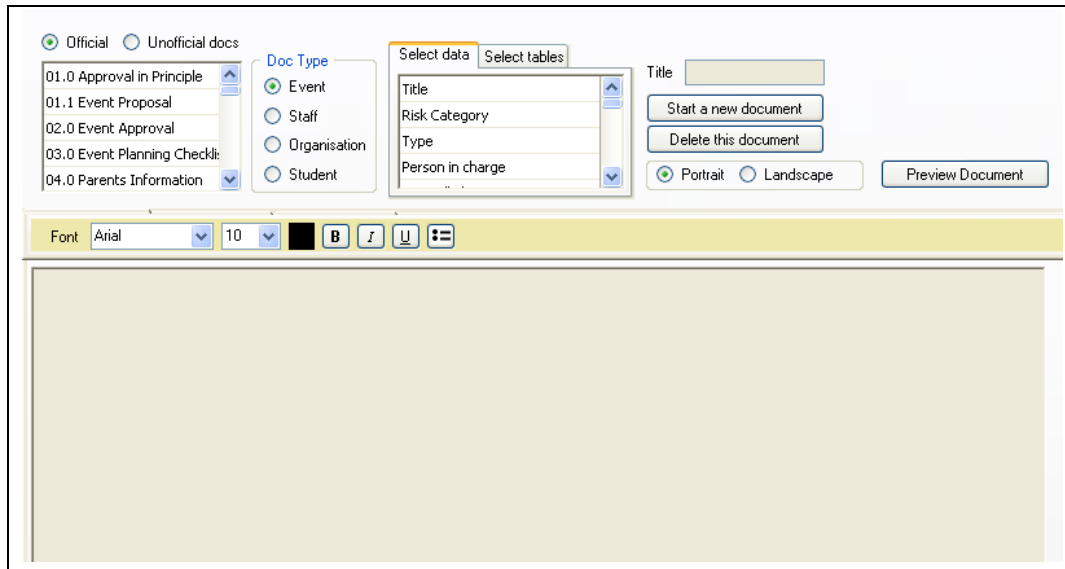
Time of Departure	Time of Return	Event	Location	Teacher in Charge	Other adults involved
		Climbing hills	Dunstan Ranges	Alan Forgie	Alice Murphy

44% 1 of 2 Ready

## 6.4 Document Design

EOTC arrives with over forty predesigned official documents. It also comes with one pre-designed unofficial demonstration document. It is the process of designing that unofficial demonstration which will form the centre of this section of the manual.

Click on Document Design and the following screen will appear.



In the top left hand corner of the screen you can see that you can choose between 'Official' and 'Unofficial' documents. By default the former is chosen.

Let's look briefly at one of the official documents and then we'll switch over and design an unofficial document.

The official documents are listed in a list box near the top left hand corner of the screen. Scroll it down and you will see that they are all there.

Return to the top and select the third document named '02.0 Event Approval' – and it will appear in the screen below, a part of which is shown in the following illustration.

You can see that this is, for the most part, a simple text document which you can edit – should you wish to alter the wording.

Official ☒ Unofficial docs

Doc Type: ☒ Event ☐ Staff ☐ Organisation ☐ Student

Select data: Title, Risk Category, Type, Person in charge

Title: 02.0 Event Approval

Start a new document, Delete this document, Preview Document

Font: Arial, 14, Bold, Italic, Underline, Bulleted List

**Event : {Spec.col(101)} Person in Charge : {Spec.col(104)}**

**STAGE 1: APPROVAL IN PRINCIPLE**

To the teacher in charge:

**EITHER ( )**

We are satisfied with the proposed planning, organisation and staffing of the EOTC event. We give approval to go ahead and plan the event.

Please ensure that we have all relevant information including: a final list of students, staff and volunteers; details of parental consent; a detailed itinerary (including maps) at least seven days before the group is due to leave.

Your report and evaluation of the EOTC event, including details of any incidents, should be with us as soon as possible but no later than 14 days after the group returns.

**OR ( )**

We require the following information or specific changes before approval in principle can be given.

The point of most interest is in the top line of the text of the document :

Event : {Spec.col(101)} Person in Charge : {Spec.col(104)}

This line includes two code insertions and it is these insertions which enable the document to refer information relating to a different event or person each time it is printed. These codes are selected from the 'Select data' tab in the centre of the top of the design screen. We'll deal with them more fully shortly when we design an official document as a demonstration.

Some of the official documents are different from the others.

### 01.0 Approval in Principle

This is a complex document and cannot be edited. It is generated separately within the software. However, near the top of the document is some text which you CAN edit – by editing the version available here. Select that document and you'll see that the top appears as :

Complete this form and give it to the EOTC Coordinator. The coordinator will then pass it on to the principal to sign off approval in principle. You then need to follow up EOTC Event Approval systems. Remember that all paperwork is due in two weeks prior to the event.

The text above this line may be edited to provide the heading text for the document. Please note that the document itself may be printed via the Event screen.

The text above the dotted line may be edited and this will subsequently replace the original text when the true version of the document (shown in part below) is printed.

You can see the text referred to in the illustration.



Arthur's Academy

## EOTC and Sports Events : Approval in Principle

1.0

**Information:** Complete this form and give it to the EOTC Coordinator. The coordinator will then pass it on to the principal to sign off approval in principle. You then need to follow up EOTC Event Approval systems. Remember that all paperwork is due in two weeks prior to the event.

**Event title** Catching fish

**Location of Event** Clutha River

A second document which is a little different is '30.0 NID report Form' – which appears in the designer as :

Font
Arial
10
B
I
U
≡

### The NID Report Form

This document is supplied as a pdf document and, should you elect to print it, you will be given the option to view / print the original document.

This version of the document is, obviously, not intended to be printed.

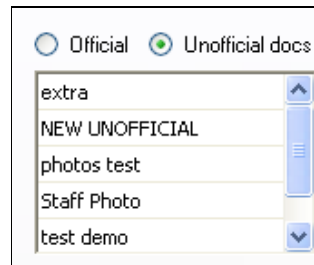
Some official documents are extremely simple, e.g. '25.1 media Wallet Cards 1'

This document includes the simple code : {Spec.table(211)}

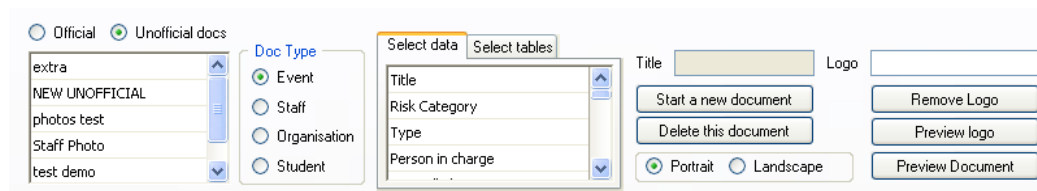
This will be explained shortly but, when encountered by the printing routine it causes

the grid of media cards to be printed.

OK, now let's move to unofficial documents and, to begin this, click on the 'Unofficial docs' option dot at the top left hand corner of the screen. Any documents you have designed will be listed :



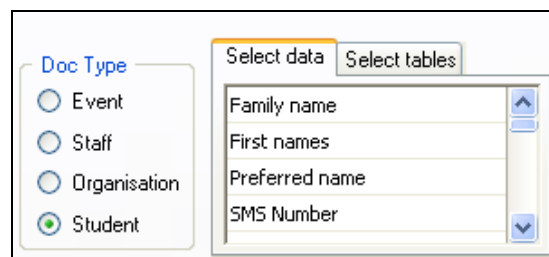
Before we begin to design our sample document let's have a look through the top area of the design screen.



We've already met the left hand portion of this – the document selection part.

Next we come to the place where you indicate which of the four possibilities your document refers to – an Event, a Staff member, an Organisation or a Student.

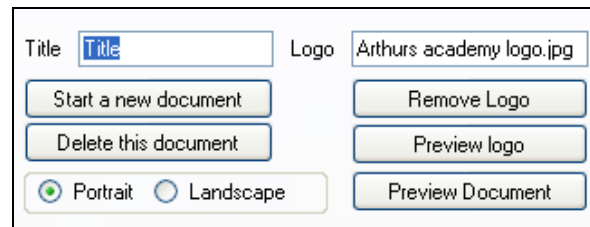
When you make this selection the choices in the next area – the code selection area – will be altered to match your choice. For example, if we switch to 'Student' then the choices appear as :



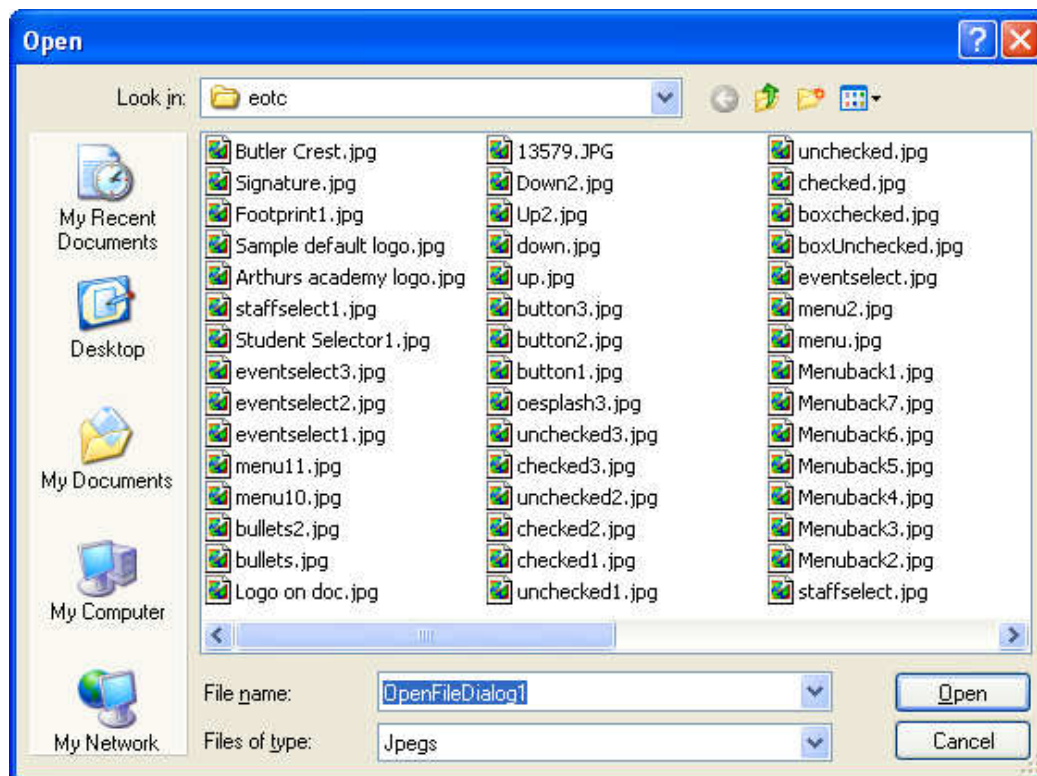
To start a new document we must first visit the right hand side of this area where we click the button labelled 'Start a new document'. This will clear any previous document and enter the word 'Title' into the title area. It will also add the new document titled 'Title' to the list of documents, will set the default type to 'Event'



and will attach the default 'unofficial' document logo – if you've specified one under Configuration.



The first thing you must do is to change the title from 'Title' to something a little more sensible. We'll change it to 'Demonstration Document'. We can, if we so wish, now select a different individual logo for this document by clicking in the logo title area. This will cause the file selection dialogue to be displayed ....



... via which you can select a different logo.

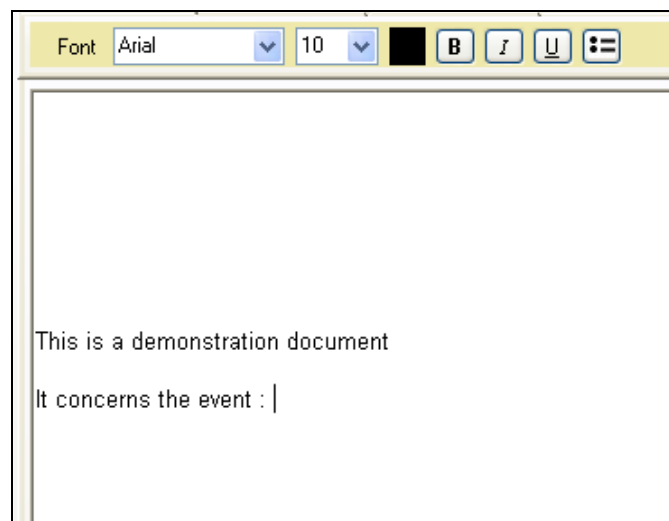
Once you've got a logo specified it's a good idea to see what it looks like. You can do this by clicking on the button labelled 'Preview logo'. This will cause the preview screen to be displayed via which you can use the buttons shown below to adjust its size and position. Sadly, sometimes the buttons seem to be somewhat contrary.

I've checked the code over and over and cannot see why sometimes they seem to have either no effect or the opposite to that intended. Never-the-less, by trial and error you will be able to get your logo looking correct.



Once you've completed that task click on the button labelled 'Return to document design' to do so.

Now we are ready to begin entering text into the document. For a start, as there is a logo involved, I've pressed the <Enter> key several times to move the cursor down a few lines. Then I've typed the following :



Now I'm ready to enter the code which will generate the event title when I print the document. To do this click on the entry 'Title' in the 'Select data' tab. This will result in the code `{Spec.col(101)}` being added to the document :

```
This is a demonstration document  
It concerns the event : {Spec.col(101)}
```

And that's all there is to it.

We can now add a few more details to the document :

```
This is a demonstration document  
It concerns the event : {Spec.col(101)}  
The event begins at {Spec.col(108)} on {Spec.col(107)} and is being lead by {Spec.col(104)} . It will be held at the location : {Spec.col  
(105)} and will last for {Spec.col(136)} days. (That's a total of {Spec.col(166)} hours).  
The cost per student is {Spec.col(113)}
```

When printed, this results in :

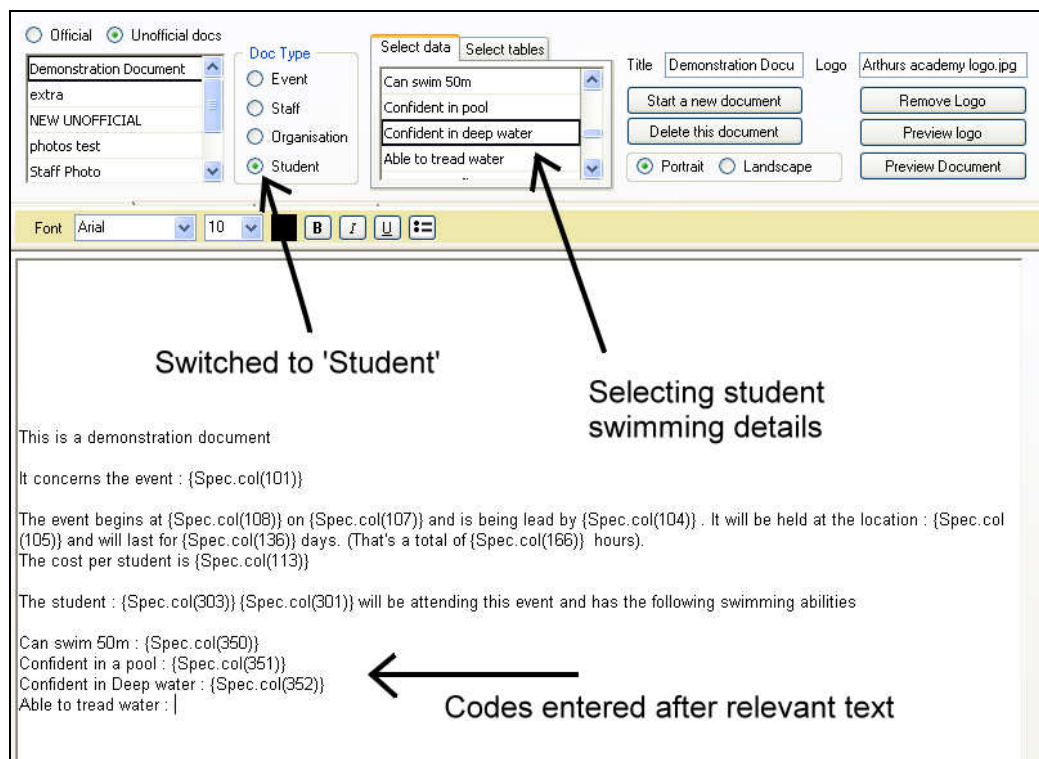
```
This is a demonstration document  
It concerns the event : Catching fish  
The event begins at 8.30am on 05/05/2010 and is being lead by Hay, Elizabeth . It will be held at the location : Clutha River  
and will last for 3 days. (That's a total of 46 hours).  
The cost per student is 16.8
```

Of course, this is not laid out particularly beautifully. You can use tabs to space things across a document but bear in mind that, when a code is replaced by actual text, the spacing via tabs may become somewhat unpredictable.

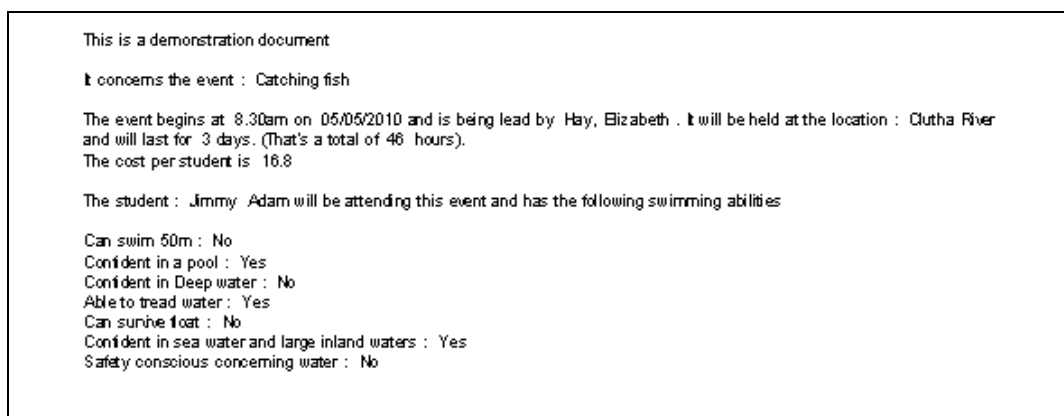
If you wish to refer, in the document, to a student attending the event then :

- a) Switch the document type temporarily to 'Student'
- b) Enter the text and codes referring to a student
- c) If a student or staff or organisation's codes are included in an event document then you should NOT switch back to 'Event' as the document type.

In the example below I am in the middle of adding information about a student's swimming ability. Note the messages about what is going on.



Once the process is complete then, when printed, it might appear as :



The remaining facility to explain is the second tab in the code selection area.

If you switch to 'Select tables' then you will find a number of other possibilities which are used when it is more than simple data which you wish to insert into your document. These possibilities include :

---

New page – portrait, New page – landscape

Sometimes you might wish to create a document which is part portrait and part landscape.

Tickbox left, Tickbox centre, Tickbox right

This allows you to create a small square (a tick box) on your document at the left, centre, or right position within the line. It pays to have the code for the box as the first item in the line, regardless of its position.

Frame  $\frac{1}{3}$  page, Frame  $\frac{1}{4}$  page, Frame  $\frac{1}{5}$

This creates a box the width of the page width and  $\frac{1}{3}$ ,  $\frac{1}{4}$ , or  $\frac{1}{5}$  of a page deep.

The rest of the possibilities under events relate to the more complex tables which report data on the documents. An example of this is :

Emergency phone list – which results in the code : {Spec.table(205)}

This will cause the entire emergency phone list to be added to the document.

Many of the tables on the official documents are generated in this way.

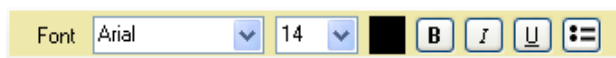
Students have a different set of 'Select tables' possibilities, including :

Photograph left, Photograph centre and Photograph right

This code results in the student's photograph being added to the document in the specified position.

Examples of these have been added to the demonstration document.

Finally, the possibilities at the top of the document design area ...



... have been used to change the font size in some area and the Bold and Bullets buttons have been used to alter some of the presentation. Now the document design looks like :

### This is a demonstration document

It concerns the event : {Spec.col(101)}

The event begins at {Spec.col(106)} on {Spec.col(107)} and is being lead by {Spec.col(104)} . It will be held at the location : {Spec.col(105)} and will last for {Spec.col(136)} days. (That's a total of {Spec.col(166)} hours).  
The cost per student is {Spec.col(113)}

The student : {Spec.col(303)} {Spec.col(301)} will be attending this event and has the following swimming abilities

- Can swim 50m : {Spec.col(350)}
- Confident in a pool : {Spec.col(351)}
- Confident in Deep water : {Spec.col(352)}
- Able to tread water : {Spec.col(353)}
- Can survive float : {Spec.col(384)}
- Confident in sea water and large inland waters : {Spec.col(385)}
- Safety conscious concerning water : {Spec.col(386)}

Students Photograph

{Spec.table(309)}

And the resulting document appears as :



**Arthur's Outdoor Academy of Excellence**  
P O Box 321, Kairakau 9340



### This is a demonstration document

It concerns the event : Catching fish

The event begins at 8.30am on 05/05/2010 and is being lead by Hay, Elizabeth . It will be held at the location : Clutha River and will last for 3 days. (That's a total of 48 hours).  
The cost per student is 16.8

The student : Jimmy Adam will be attending this event and has the following swimming abilities

- Can swim 50m : No
- Confident in a pool : Yes
- Confident in Deep water : No
- Able to tread water : Yes
- Can survive float : No
- Confident in sea water and large inland waters : Yes
- Safety conscious concerning water : No

Students Photograph



This code will generate a tickbox at the right hand side of the page.



---

Final notes on document design – some things to be aware of.

1. If you should use the tab key to tab across the document and then immediately follow that with a code it seems that, for some reason, the first word of the resulting document entry is occasionally removed. Hence it is wise, when using a tab followed by a code, to insert a single space between the tab and the code. i.e. you should tab to the required position across the page, press the space bar to enter a space and THEN insert the required code.
2. The document design screen also has buttons which allow you to
  - a) Preview the document
  - b) Preview the logo (mentioned earlier)
  - c) Remove any attached logo
  - d) Delete the document entirely
  - e) Choose between Portrait and Landscape as your document format.
3. If you use a code for a display of data (a piece of datum) and the event, staff, organisation or student has no entry for that particular request then a line is generated in the document – which would indicate that information could be written on to the printed document at that point.

This is useful for preparing a 'fill in the blanks' document

This brings us to the end of the document design process. Now we move to the printing of documents.

## 6.5 Document Printing

Finally, we come to the printing of our previously defined documents. Click on the left hand button labelled 'Document Printing' and you will arrive at the screen shown below.

This screen has, initially, three selection areas including five document printing steps.

## Step 1

Chose whether you wish to print an official document (the default setting) or an unofficial document. Select by clicking in the relevant option dot at the top left hand corner of the screen.

**Document Printing**

**Step 1 Choose**

☒ Official ☐ Unofficial documents

**Step 2 Select the document to print**

- 01.0 Approval in Principle
- 01.1 Event Proposal
- 02.0 Event Approval
- 03.0 Event Planning Checklist
- 04.0 Parents Information
- 05.0 Blanket Consent
- 05.1 Blanket Consent
- 05.2 Blanket Consent
- 06.0 Parental Consent
- 07.0 Health Profile (Student)
- 08.0 Medications Administered
- 09.0 Health Care Plan
- 10.0 Aquatic Consents
- 11.0 Student Contract
- 12.0 Activity Leader
- 13.0 Volunteer Assistant Agreement
- 14.0 Contracting Checklist
- 15.0 School/Provider Agreement
- 16.0 Outside provider
- 17.0 RAMS: Hazard Management
- 18.0 RAMS : Risk Management P
- 19.0 Safety Action Plan
- 20.0 Participants Summary
- 20.1 Participants with Meds
- 21.0 Event Phone Numbers
- 22.0 Venue/Facility Safety

**Step 3 Select an event**

This step is optional. You may proceed directly to the selection of students. Select an event if you wish to print for those students connected to a particular event.

**Step 4 Select the student(s) to print**

**Step 5**

Proceed to Print

For the demonstration we'll switch to 'Unofficial documents' and select the one we have just finished designing.

## Step 2

Select the document which you wish to print.

**Document Printing**

**Step 1 Choose**

☐ Official ☒ Unofficial documents

**Step 2 Select the document to print**

- Demonstration Document
- extra
- NEW UNOFFICIAL
- photos test
- Staff Photo
- test demo

**Step 3 Select an event**

This step is optional. You may proceed directly to the selection of students. Select an event if you wish to print for those students connected to a particular event.

- Catching fish
- Climbing hills
- Gathering Mulberries
- Rock Climbing
- Tree Climbing

**Step 4 Select the student(s) to print**

Ad.	Alan
Ad.	ie
Ad.	an
Ad.	
Ad.	lin
Alk	nine
Alk	dra
Aitl	i
Aitl	
Alk	h, Sarunthorn
Ale	a
Ale	atasha
Alfr	
Alfr	
Allic	i
Alle	y
Alls	ael
Aly	ah
Am	ia

**Step 5**

Proceed to Print



As we select our 'Demonstration Document' the program notes that it involves events and students, so both lists are populated.

### Step 3

Select the event required. Please note that this is not essential. If you do NOT select an event then, if the document has information relating to an event, the resulting fields will have lines instead of data.

Once you do select an event then the students (in this case) attached to the event will be listed in the third table.

### Step 4

Select those students for whom you wish to generate copies of the document

Document Printing																																					
<b>Step 1</b> Choose <input type="radio"/> Official <input checked="" type="radio"/> Unofficial documents <b>Step 2</b> Select the document to print <div>           Demonstration Document            extra            NEW UNOFFICIAL            photos test            Staff Photo            test demo         </div>	<b>Step 3</b> Select an event <small>This step is optional. You may proceed directly to the selection of students. Select an event if you wish to print for those students connected to a particular event.</small> <div>           Catching fish            Climbing hills            Gathering Mulberries            Rock Climbing            Tree Climbing         </div>	<b>Step 4</b> Select the student(s) to print <table border="1"> <tbody> <tr><td>Ad</td><td>as Alan</td></tr> <tr><td>Adc</td><td>rgan</td></tr> <tr><td>Adc</td><td>ie</td></tr> <tr><td>Aike</td><td>amine</td></tr> <tr><td>Aitk</td><td>sh</td></tr> <tr><td>Ales</td><td>ana</td></tr> <tr><td>Ave</td><td>es</td></tr> <tr><td>Bair</td><td></td></tr> <tr><td>Bak</td><td></td></tr> <tr><td>Bak</td><td>te</td></tr> <tr><td>Bar</td><td>ayla</td></tr> <tr><td>Bab</td><td>ome</td></tr> <tr><td>Bay</td><td>on</td></tr> <tr><td>Bar</td><td>art</td></tr> <tr><td>Univ</td><td></td></tr> <tr><td>Duf</td><td>a</td></tr> <tr><td>Edd</td><td>Guy</td></tr> </tbody> </table>	Ad	as Alan	Adc	rgan	Adc	ie	Aike	amine	Aitk	sh	Ales	ana	Ave	es	Bair		Bak		Bak	te	Bar	ayla	Bab	ome	Bay	on	Bar	art	Univ		Duf	a	Edd	Guy	<b>Step 5</b> <div>Proceed to Print</div>
Ad	as Alan																																				
Adc	rgan																																				
Adc	ie																																				
Aike	amine																																				
Aitk	sh																																				
Ales	ana																																				
Ave	es																																				
Bair																																					
Bak																																					
Bak	te																																				
Bar	ayla																																				
Bab	ome																																				
Bay	on																																				
Bar	art																																				
Univ																																					
Duf	a																																				
Edd	Guy																																				

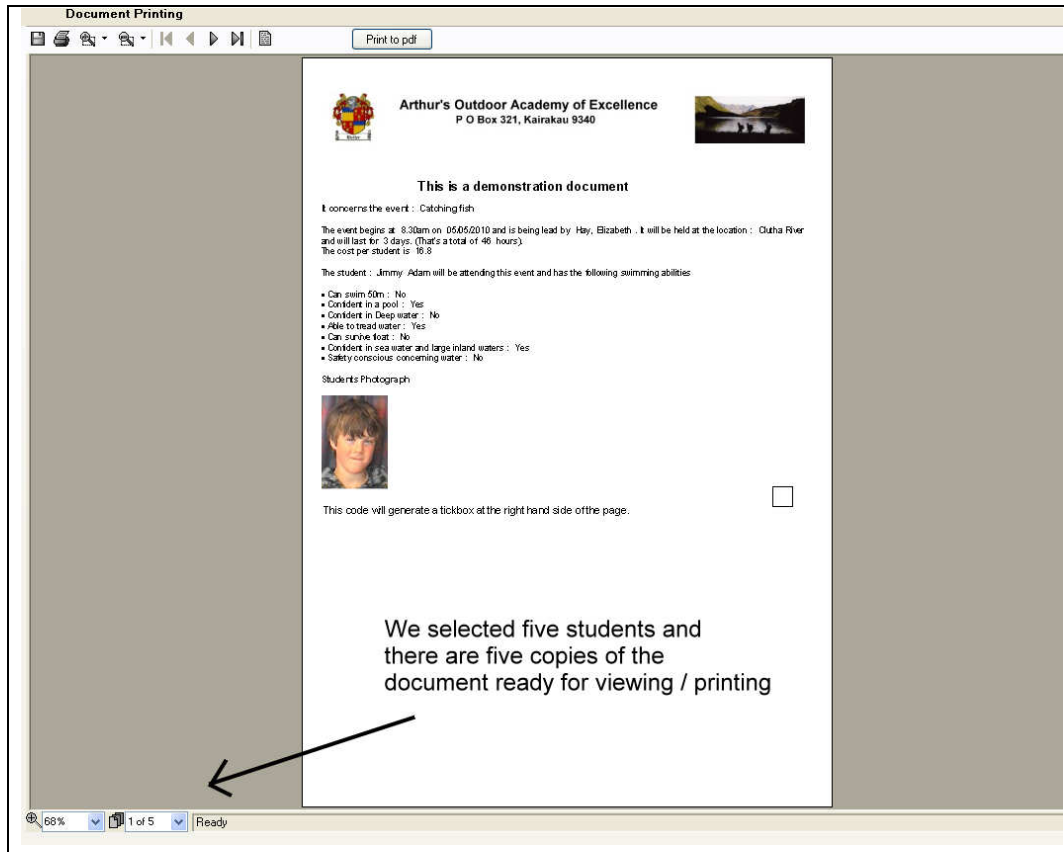
### Step 5

Proceed to print

The documents will be generated. (Sometimes the screen goes blank momentarily during this process – at least it does on my computer) and you will be switched to the document preview screen where you may

- View the document(s)
- Save them to file

- Print the documents





# ***Chapter 7***

## **Web Links**

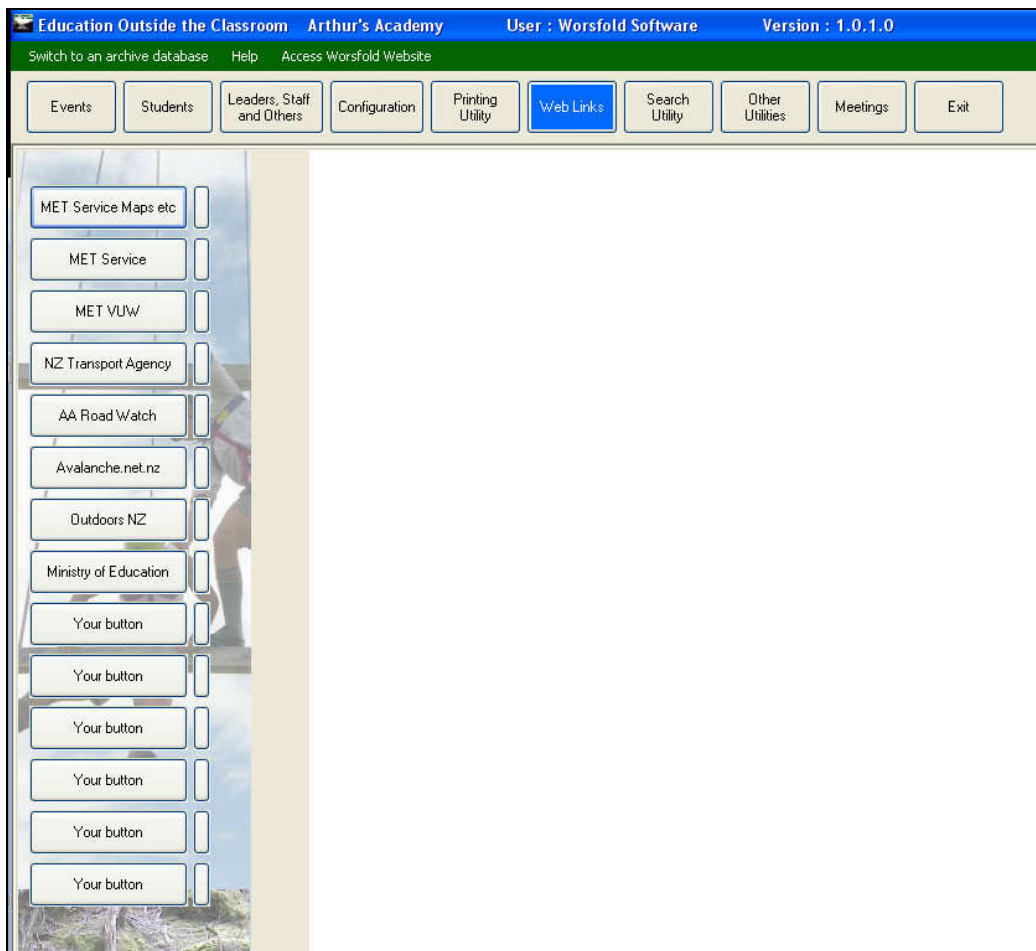
What's in this chapter?	Page
7.1 Overview	7.1
7.2 The web links	7.2
7.3 Add or Edit the web links	7.3

### **7.1 Overview**

This utility offers you quick access to a number of websites. You can modify the links and can add new links of your own. At this stage the package allows for up to fourteen weblinks and eight of these have been provided for you.

The main screen on first arrival is as shown below.

The buttons down the left hand side of the screen each access a different website.



## 7.2 The web links

Click on the first weblink – Met Service Maps etc – and the site will be displayed in the browser on the right hand side of the screen, as shown below.

This site offers weather maps, rain forecasts, satellite images and others. The rain forecast, in particular, allows you to view expected rainfall areas for up to seven days in advance.



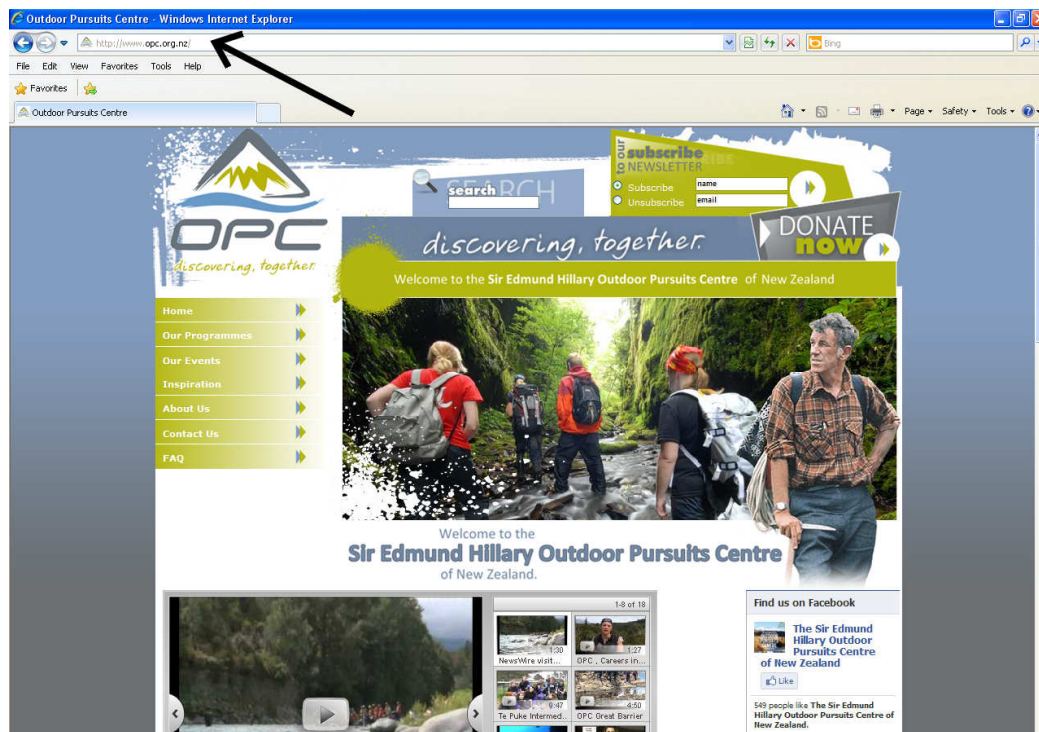
## 7.3 Add or Edit the web links

To alter an existing link or to add a new link you need to know the url of the site which you wish to add. (a URL is a Uniform Resource Locator and is the unique address for a resource on the internet. E.g. the URL of Worsfold's website is : <http://www.worsfoldsoftware.co.nz>)

URLs are not displayed via this built-in browser. To find the URL of a site which you wish to add first use Internet Explorer or Google Chrome (or your other favourite browser) to find the site you wish to add. At the top of the screen, in the 'address bar' you will see the URL. Copy this by highlighting it and then press Ctrl-C to copy.

For example, let's assume that you wish to add a link to the Sir Edmund Hillary Outdoor Pursuits Centre. Google the website and visit it, as shown below.

The URL is in the address bar at the top of the screen. Copy it and it will be in the Windows Clipboard.



Now go in to the EOTC weblinks screen and select one of the 'Your Button' buttons on the left hand side of the screen. Click on the small button to the right of your selected button and the following dialogue will appear.

**Specify your own web link**

To connect one of the weblink buttons to a web site of your own choice enter the button title and the web url below.

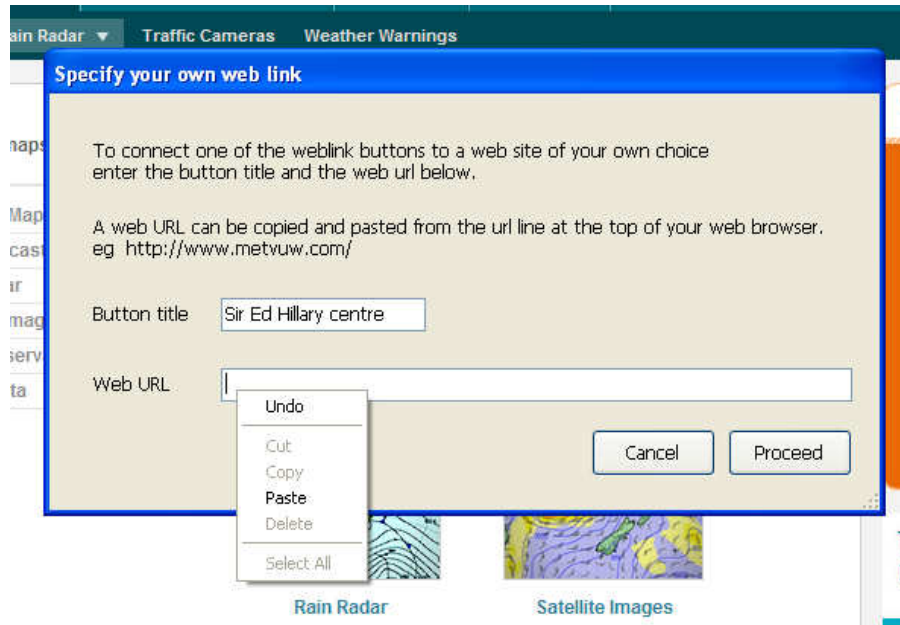
A web URL can be copied and pasted from the url line at the top of your web browser.  
eg <http://www.metvuw.com/>

Button title

Web URL

Change the entry 'Your Button' to something more suitable, such as 'Sir Ed Hillary Centre' and then click in the web URL area below.

Once there you can press Ctrl-V (to paste the memorised link) or you can right-click to have the popup menu displayed from which you can select 'Paste'.

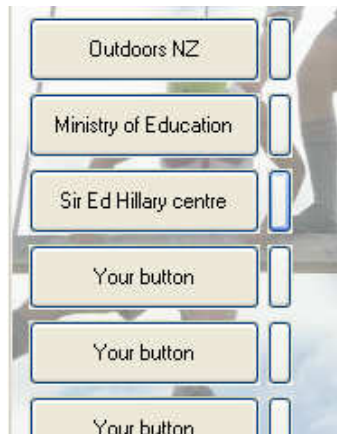


The result will be :

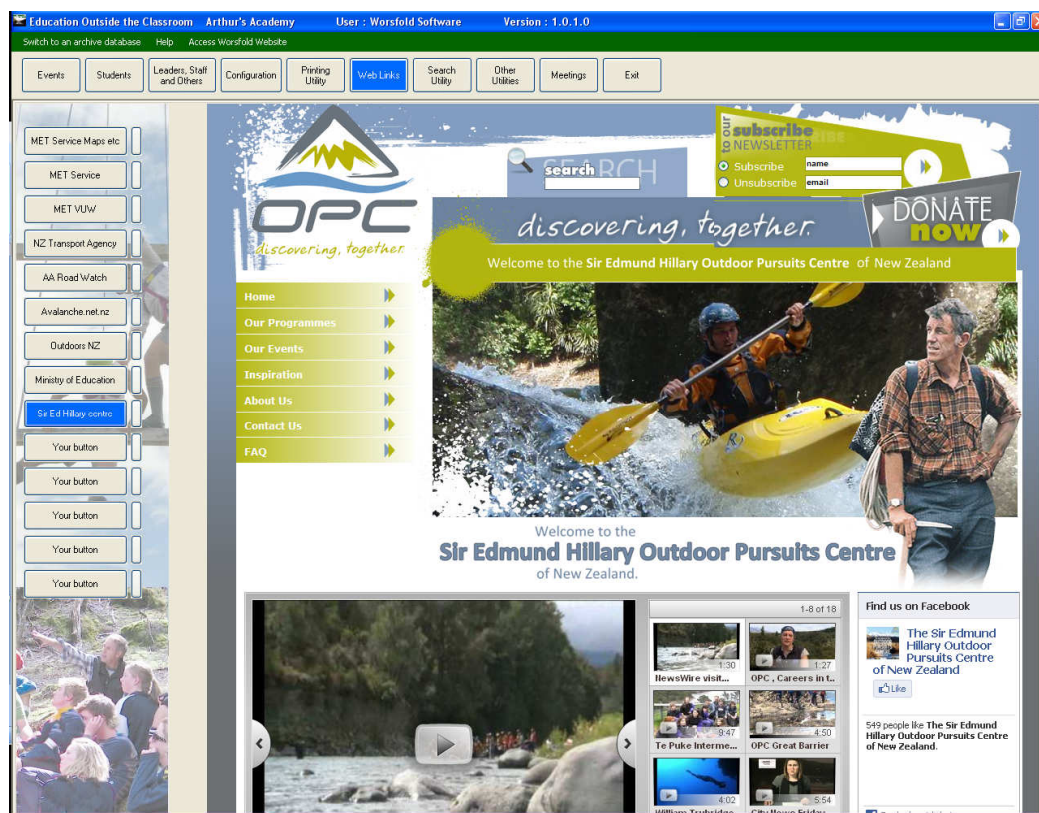




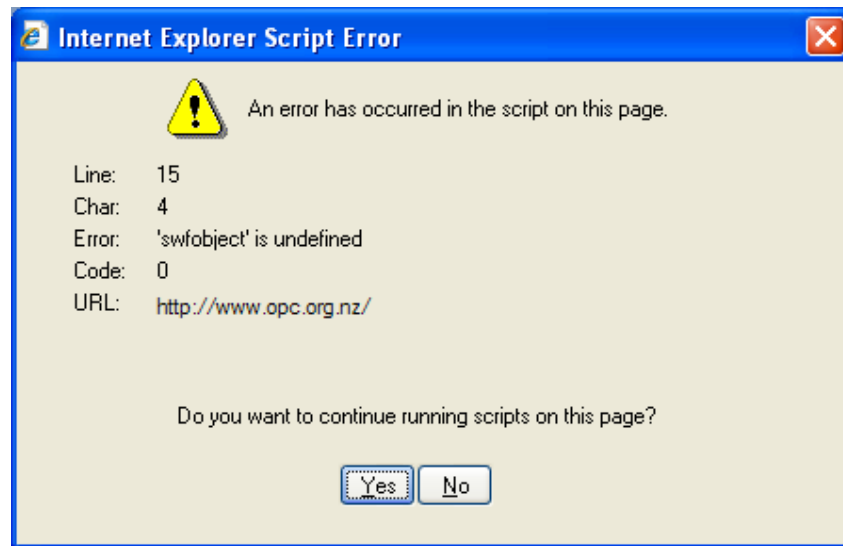
Click 'Proceed' and your new button will appear as :



... and you can now click it to arrive at :



N.B. Occasionally, when clicking on a link, the following message (or one like it) may appear :



I have been successful in continuing to the required screen by clicking either yes or No on this screen. My grandson tells me that it is caused by a small fault on the website concerned.....and he knows these things.



# Chapter 8

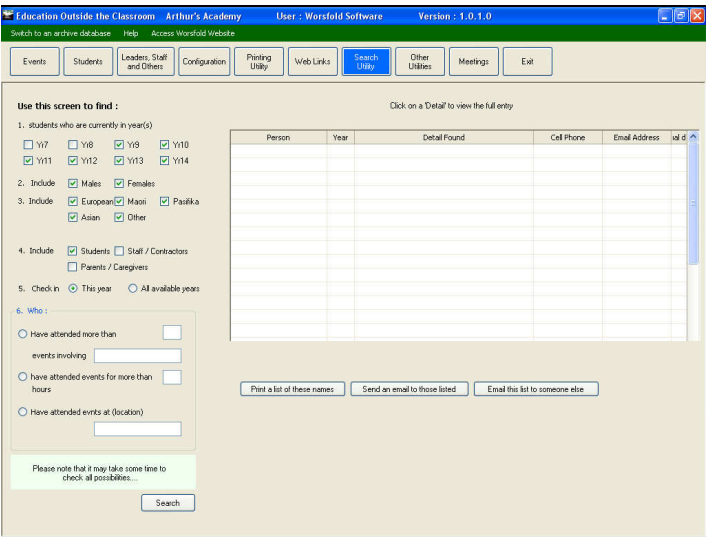
## Search Utility

What’s in this chapter?	Page
8.1 Overview	8.1
8.2 Performing Searches	8.2

### 8.1 Overview

The purpose of this process is to enable you to indentify students or staff members who fall in to particular categories and, if so desired, then send them an email or print a list.

The main screen for this utility is shown below. You make your requests on the left hand side of the screen and the results of the search will be displayed on the right hand side.



## 8.2 Performing searches

Fill in your requirements on the left hand side of the screen.

**Use this screen to find :**

- students who are currently in year(s)  
☐ Yr7   ☐ Yr8   ☒ Yr9   ☒ Yr10  
☒ Yr11   ☒ Yr12   ☒ Yr13   ☒ Yr14
- Include   ☒ Males   ☒ Females
- Include   ☒ European   ☒ Maori   ☒ Pasifika  
                  ☒ Asian   ☒ Other
- Include   ☒ Students   ☐ Staff / Contractors  
                  ☐ Parents / Caregivers
- Check in   ☒ This year   ☐ All available years
- Who :  
☐ Have attended more than   
                  events involving   
☐ have attended events for more than   
                  hours  
☐ Have attended events at (location)

Please note that it may take some time to check all possibilities....

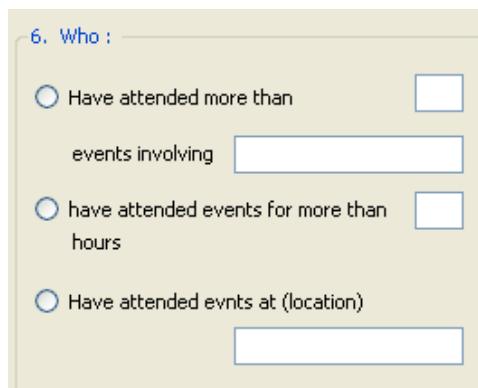
1. If you are searching for students then select those year levels which you wish to include in the search.
2. Select the gender of the students required.
3. Select the ethnicities of the students required

These three criteria apply only to searches for students. They will be ignored when

---

searching for adults.

4. Indicate which people you wish to include in your search : students / staff and/or contractors, students' caregivers.
5. You may elect to search for those who meet the requested criteria in either just the current year or all years (going back to 2011 – when this package was first released)
6. The search criteria



The screenshot shows a form titled '6. Who :'. It contains three radio button options for search criteria:

- ☐ Have attended more than [ ] events involving [ ]
- ☐ have attended events for more than [ ] hours
- ☐ Have attended events at (location) [ ]

You can search for :

- a) Those who have attended more than a given number of events involving a particular word. You can leave the word empty to search just based on numbers of events attended. If you DO enter a word (or phrase) then that will be sought in the event title and the event location.
- b) You can search for those who have attended events for a total of more than a given number of hours.
- c) You can also search for anyone who has attended events at a particular location. Enter a word or phrase and all events including this word or phrase in the 'location' field will be included in the search.

At the time of writing there are just these three possibilities. It is very likely that this list will be expanded as the package evolves.

When you are ready to carry out the search click on the 'Proceed' button and bear in mind that the search may take some time.....

When the search has been completed the results will be displayed in the table on the right hand side of the screen.

[illegible]

Once the list is displayed you have three options which are represented by the three buttons below the table.

- Print a list of these names
- Send an email to those listed (who have email addresses – as shown in the right hand column in the table).
- Email the list of people to someone else.

In the case of the latter two choices you will proceed to the email dialogue as detailed earlier in the manual for you to enter a message and send the email. N.B. This will NOT cause a record of sent emails to be added to your usual email program. However a record IS kept and you can view it via Other Utilities, which is the subject of the next chapter.

# *Chapter 9*

## **Other Utilities**

What's in this chapter?	Page
9.1 Overview	9.1
9.2 End of Year Process	9.2
9.3 Email your database	9.4
9.4 Emails sent	9.4
9.5 Global permissions	9.6

### **9.1 Overview**

This section of the program provides a number of useful utilities.

The main utility screen appears as shown below with a button for each of the utilities in the left hand column.

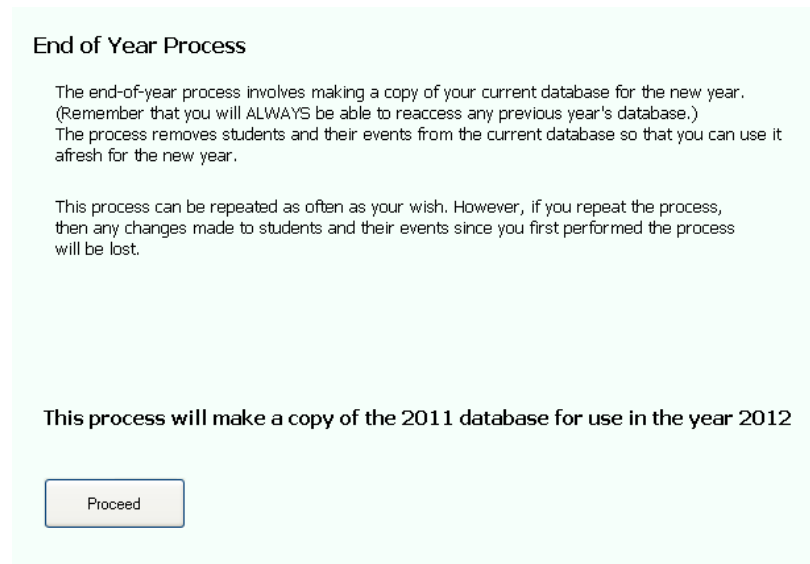




## 9.2 The End-of-Year process

The package maintains a separate data for each year of operation. At the end of each year (or early in the new year) you should visit Utilities and carry out the 'End-of-Year' rollover process. This will make a copy of the old year's database and rename it for the new year. It will then remove students and their event attendances from the new year's data leaving it ready to use.

The screen appears as shown below.

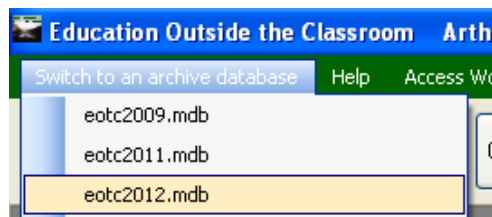


If you have already performed this process then a yellow message will appear

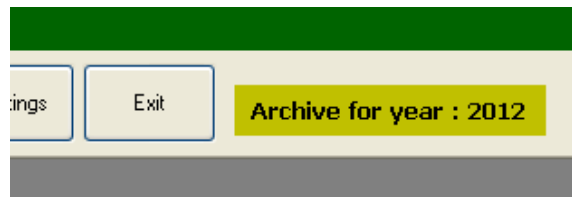
warning you of this fact. E.g.

**N.B. This process HAS already been performed at least once.  
If you proceed then any student (and their events) in the new  
database will be removed.**

Once you have prepared the database for the new year you will be able to access it via the popup menu at the top of the main screen.



Once you've done that, a label at the top of the main screen will remind you that you are in that particular year.



Please note that the change to a different year does not 'stick'. Each time you enter the package it will automatically revert to the current year.

## 9.3 Email your database

It is possible that you might encounter a puzzle with your use of the program which suggests that you've come up against something which the program design and testing phase had not anticipated. In this instance it's extremely useful if a copy of the database in question can be sent to Worsfold Software to enable the problem to be traced. Nine times out of ten the problem is in the program and not in the database – but it cannot be traced without the database which causes the problem to be exhibited.

**How to send a copy of your database to Worsfold**

Should it ever be necessary to send a copy of your database to Worsfold Software Ltd then please follow these instructions.

The task is to email a renamed and compressed copy of the database. If you click the button below then a copy of the database will be made and it will also be renamed. The copy will be on your desktop and it will be named using your school name.

Copy and rename your database

Copied file name : File not yet copied

Having clicked the button above the database will now have been copied and renamed. The next task is to compress it and to then email it to [randcbutler@inspire.net.nz](mailto:randcbutler@inspire.net.nz)

If you do not know how to zip (compress) a file than please ask your IT person for assistance then email to compressed file to the above address.

Remember to include in the email a reminder as to why you are sending the backup, along with the name of any student or any other relevant details to enable us to reproduce the problem.

**Email database to : [randcbutler@inspire.net.nz](mailto:randcbutler@inspire.net.nz)**

Print these instructions

## 9.4 View sent emails

When emails are sent to students, staff and/or caregivers from within this package no record of them is kept in your normal email program as the sending is done from outside that program and it has no knowledge of the process. These emails sent

from within the program ARE never-the-less recorded and stored in the current EOTC database.

This utility allows you to view sent emails, to print them and/or delete them.

The screen is in two horizontal halves. In the top half the sent emails are displayed in a table. If you click on a particular email it will be displayed in the bottom half of the screen as shown in the illustration below.

**Sent Emails**

Del	Time date	From	To	Subject	Message	Attachment
<input type="checkbox"/>	26/01/2011 8:02:38 a.m.	Worsfold Software	arthur.sutherland@gmail.com	Message from Arthur's Acaden	Hi Arthur□□□□I've just adder C:\VB9\eotc\Butler Crest.jpg	
<input type="checkbox"/>	26/01/2011 11:02:38 a.m.	Worsfold Software	randcbutler@inspire.net.nz	Message from Arthur's Acaden	Hi Arthur□□□□I've just adder C:\VB9\eotc\Butler Crest.jpg	
<input type="checkbox"/>	27/01/2011 9:03:38 a.m.	Worsfold Software	sarah.aitken@ytra.co.nz	Message from Arthur's Acaden	Hi Susan□□□□We are now le-	
<input type="checkbox"/>	28/01/2011 10:05:26 a.m.	Worsfold Software	randcbutler@inspire.net.nz	Message concerning the EOTC	Hi everyone□□□□The bus coi	
<input type="checkbox"/>	29/01/2011 10:05:26 a.m.	Worsfold Software	randcbutler@inspire.net.nz	Message concerning the EOTC	Hi everyone□□□□The bus coi	
<input type="checkbox"/>	29/01/2011 11:25:26 a.m.	Worsfold Software	randcbutler@paradise.net.nz	Message concerning the EOTC	Hi everyone□□□□The bus coi	
<input type="checkbox"/>	29/01/2011 11:25:26 a.m.	Worsfold Software	randcbutler@inspire.net.nz	Message concerning the EOTC	Hi everyone□□□□The bus coi	
<input type="checkbox"/>	29/01/2011 11:25:26 a.m.	Worsfold Software	ebain@ytra.co.nz	Message concerning the EOTC	Hi everyone□□□□The bus coi	
<input type="checkbox"/>	29/01/2011 11:25:26 a.m.	Worsfold Software	ti@yehah.com	Message concerning the EOTC	Hi everyone□□□□The bus coi	
<input type="checkbox"/>	29/01/2011 11:25:26 a.m.	Worsfold Software	sarah.aitken@ytra.co.nz	Message concerning the EOTC	Hi everyone□□□□The bus coi	
<input type="checkbox"/>	29/01/2011 11:25:26 a.m.	Worsfold Software	brogan@ytra.co.nz	Message concerning the EOTC	Hi everyone□□□□The bus coi	

Date time 29/01/2011 10:05:26 a.m.

From Worsfold Software

To randcbutler@inspire.net.nz

Subject Message concerning the EOTC event : Catching fish

Message

Hi everyone

The bus company has rung to say that it will be leaving at 6pm and not at 5.30 as previously arranged. Please make sure that you arrive at the buss station half and hour earlier than originally planned - i.e. at 5.30pm

Thanks

Genry

Attachment

Once an email is displayed in the lower half you may print it by clicking on the 'Print' button at the bottom of the screen.

Down the left hand side of the emails table is a column of tick boxes labelled 'Del' – short for 'delete'. You can tag individual emails by clicking in these boxes, or you can tag ALL by clicking the button at the top of the screen labelled 'Tag all emails'

Sent Emails				
<input type="button" value="Un-Tag all"/> <input type="button" value="Delete tagged emails"/> <input type="button" value="Print tagged emails"/>				
Del	Time date	From	To	Sub
<input checked="" type="checkbox"/>	26/01/2011 8:02:38 a.m.	Worsfold Software	arthur.sutherland@gmail.com	Message from /
<input checked="" type="checkbox"/>	26/01/2011 11:02:38 a.m.	Worsfold Software	randcbutler@inspire.net.nz	Message from /
<input checked="" type="checkbox"/>	27/01/2011 9:03:38 a.m.	Worsfold Software	sarah.aitken@ytra.co.nz	Message from /
<input checked="" type="checkbox"/>	28/01/2011 10:05:26 a.m.	Worsfold Software	randcbutler@inspire.net.nz	Message conce
<input checked="" type="checkbox"/>	29/01/2011 10:05:26 a.m.	Worsfold Software	randcbutler@inspire.net.nz	Message conce
<input type="checkbox"/>	29/01/2011 11:25:26 a.m.	Worsfold Software	randcbutler@paradise.net.nz	Message conce
<input type="checkbox"/>	29/01/2011 11:25:26 a.m.	Worsfold Software	randcbutler@inspire.net.nz	Message conce
<input checked="" type="checkbox"/>	29/01/2011 11:25:26 a.m.	Worsfold Software	ebain@ytra.co.nz	Message conce
<input type="checkbox"/>	29/01/2011 11:25:26 a.m.	Worsfold Software	ti@yehah.com	Message conce
<input checked="" type="checkbox"/>	29/01/2011 11:25:26 a.m.	Worsfold Software	sarah.aitken@ytra.co.nz	Message conce
<input type="checkbox"/>	29/01/2011 11:25:26 a.m.	Worsfold Software	brogan@ytra.co.nz	Message conce

In the illustration above the 'Tag all emails' button has been used to tag all of them and then some individual ones have been untagged by clicking in their individual tick-boxes.

Three things are now possible.

- You can click on the same button which has been relabelled to 'Untag all'
- You can click a button at the top which has been made visible to delete all of the tagged emails.
- You can click a second new button which has been made visible to send all of the tagged emails to the printer.

## 9.5 Global permissions

Each student has six permissions which may be set to indicate whether or not each has been approved by their parents / caregivers. This utility allows you to set these globally without having to visit each student.

The screen for the process is shown below. It takes a little time for all of the students and their six permissions to be loaded and displayed. Once done you will see all of the students listed along with their year and their class.

If you wish to see just those students in a single year then click on one of the 'year' entries. Similarly, to see just those in a particular class, click on one of the 'Class' entries.

Once you have the group in which you are interested visible then you have the following options, as explained in the yellow message box at the bottom of the screen.

- You can globally tick an entire column by clicking in the 'Tick all' cell at the top of that column.
- You can globally untick an entire column by clicking in the 'Untick all' cell at the top of that column.
- You can have all of an individual student's six permissions ticked by clicking on their name
- You can tick or untick individual cells by clicking in the cells concerned.

#### Global Entry of Student Permissions

Student	Year	Class	Per 1	Per 2	Per 3	Per 4	Per 5	Per 6
			Tick all	Tick all	Tick all	Tick all	Tick all	Tick all
			Untick all	Untick all	Untick all	Untick all	Untick all	Untick all
Adam, James Alan	11	11DR	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Adamson, Katie	11	Ra9c	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Adcock, Brogan	13	13	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Adcock, Katie	11	11	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Addison, Caitlin	8		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Aiken, Jessamine	9	9/G	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Aikin, Alexandra	11	11	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Aitken, Keiran	11	Ab1s	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Aitken, Sarah	9	9/A	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Akkavutwanich, Sarunthorn	11	11	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Alesana, Tiana	12	Cd6s	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Alexander, Natasha	12	12	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Alfeld, Holly	8	8/W	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Alfeld, Olivia	10	10/M	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Allcott, Ruben	13	Mdts	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Allen, Bethany	10	10/M	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Allsopp, Michael	12	Da2r	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Alyami, Fatimah	9	9/M	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ambauen, Alicia	13	Ab1s	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Amundsen, Ethan	11	Waec	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Anderson, Adelle	12	12	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Anderson, Charlotte	9	9/A	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Per 1 Agreement that, if a prescribed medication needs to be administered, then it will be done by a designated adult

Per 2 Approval for student to receive any emergency medical, dental or surgical treatment including anaesthetic or blood transfusion if deemed necessary by medical authority

Per 3 Agreement to meet medical costs not covered by ACC or Community Services Card

Per 4 Agreement to inform school as soon as possible of any changes in medical circumstances prior to the event.

Per 5 Agreement for student to be sent home at caregiver's expense if involved in serious disciplinary problem including alcohol / drugs / actions which threaten the safety of others.

Per 6 Consent to use of photographs and other media for publicity purposes.

Click on a year or class to view just those students. Click on a student to have ALL of their permissions ticked. Click in an individual tickbox to change just that entry. Click 'Tick all' or 'Untick all' to action a single column.



# ***Chapter 10***

## **Meetings**

What's in this chapter?	Page
10.1 Overview	10.2
10.2 One day at a time	10.3
10.3 One week at a time	10.9
10.4 One month at a time	10.10
10.5 Alarms	10.11

### **10.1 Overview**

EOTC allows you to record details of meetings between students or staff and yourself. Each user of the package will have his or her own meetings listed.

The screen consists of four tabs, three of which offer different views of the schedule, as shown in the section headings above. The final tab reveals any alarms.



## 10.2 One day at a time

The first screen displays one day's meetings, as shown below.

Meeting Schedule for Guest

View meetings for: Guest

Day Week Month Alarms

← Fri 28 Jan 2011 → 0 interviews listed Print today's meetings Display only meetings How to use this screen

Time	Student	Purpose	Before	After
8.00am				
8.15am				
8.30am				
8.45am				
9.00am				
9.15am				
9.30am				
9.45am				
10.00am				
10.15am				
10.30am				
10.45am				
11.00am				
11.15am				
11.30am				
11.45am				
12.00pm				
12.15pm				
12.30pm				
12.45pm				
1.00pm				
1.15pm				
1.30pm				
1.45pm				
2.00pm				

Meeting with student ☐ or with staff ☒ Date  Time  Date made

Meeting with :  Details

Purpose  Follow up details ☒ Complete Date due

Prior arrangements  ☒ Complete

Delete Email Print

The top of the screen lists the meetings for the day – currently showing none – and the bottom of the screen lists the details of the current meeting.

To create a meeting, click on the time slot involved. (Remember that time slots are specified via 'Configuration' as detailed in Chapter 2.)

When you click on a time slot the 'Meeting for:' text box below will become active and the cursor there will appear, waiting for you to type in the name of the student or staff member for whom the meeting is to be made. You can elect to meet with a person by ticking the option dot above the 'Meeting with' area or a staff member by ticking the second option dot labelled 'or with staff'. As you type the first letter of the person's family name, the Search window will appear, as shown below.

**Student search utility**

Search for :

Enter the first few letters of the family name sought

If only one name is listed then press <Enter>.  
If more than one is listed then either :  
a) Click on the name requested or  
b) Press the NUMBER to the left of the name

Cancel

1	Brook	olly-Lee
2	Brophy	iaun
3	Brown	iton
4	Brown	inar
5	Brown	rtney
6	Brown	ge
7	Brown	sie
8	Brown	ita
9	Brown	n
	Brown, S	ae
	Brown, S	nen
	Brown, S	dan
	Brown, S	an

In the example above I have typed the letters 'bro'. A reminder – a rectangle has been drawn over the student names intentionally to disguise them.

Type as many letters of the student or staff member's name as you need to identify the person sought. Once their name is visible either click on them or type the number to the left of their name. You will be returned to the meeting screen with the name on the day list and in the meeting details below, ready for you to enter further details.

**Meetings Schedule for Worsfold Software**

View meetings for:

Day:

Fri 28 Jan 2011 0 interviews listed

Time	Student	Purpose	Before	After
8:00am				
8:15am				
8:30am				
8:45am				
9:00am				
9:15am				
9:30am				
9:45am	Brown, Sam			
10:00am				
10:15am				
10:30am				
10:45am				
11:00am				
11:15am				
11:30am				
11:45am				
12:00pm				
12:15pm				
12:30pm				
12:45pm				
1:00pm				
1:15pm				
1:30pm				
1:45pm				
2:00pm				

Meeting with student: ☐ or with staff ☐ Date:  Time:  Date made:

Meeting with:  Details:

Purpose:  Follow up details: ☐ Complete

Prior arrangements:  Date due:

☐ Complete

Now enter the rest of the meeting details in the spaces shown below. The details fall

into four categories.

Meeting with student ☒ or with staff ☐ Date 28/01/2011 Time 9.45am Date made 29/01/2011

Meeting with: Brown, Sam . Details Follow up details ☐ Complete

Purpose . Date due . Delete

Prior arrangements . Email

☐ Complete . Print

a) The first two details refer to the meeting and allow you to record

- i) Its purpose
- ii) Whether or not the person has been notified of the meeting

The purpose is recorded by selecting from a popup list. You can add your own possibilities to the popup by clicking on the small 'dot' button to its right. This will cause the 'Popup Configuration' screen to appear, via which you can enter the various possibilities which you require. An example of the screen is shown below.

List specification

List of Purposes entries

Initial interview  
Follow up (2 months)

↑  
↓

To add to this list type in the new entry in the text box below and press <Enter> when you have finished typing

To delete an entry from the list right-click on the entry to be deleted

Close

Type the entries you require into the text box at the bottom of the screen and press <Enter> after each one.

You can move an entry up or down the list by highlighting it and using the two arrow keys to the right to adjust its position in the list.

You can delete an entry in the list by right-clicking on it.

Once you have completed the task of specifying your entries, click on the 'Close' button to return to the meetings screen.

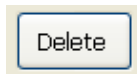
Similarly, you can record the means by which the person was notified of the appointment.

- b) The next detail allows you to note anything which you wish to prepare in advance – e.g. getting some information, booklet etc for the person.

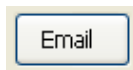
There is also a tickbox which you can use to indicate that you have completed the preparation for the meeting. The package has an 'alarm' system which can alert you to 'things you have not yet done'. Details of this are provided further on herein.

- c) The third area is where you can record details of the meeting itself – perhaps while it is in progress, or after it has been completed.
- d) Finally, you can record details of follow-up tasks which you or the person might have to perform. Again, there is a tick box which you can use to indicate that the task has been completed.

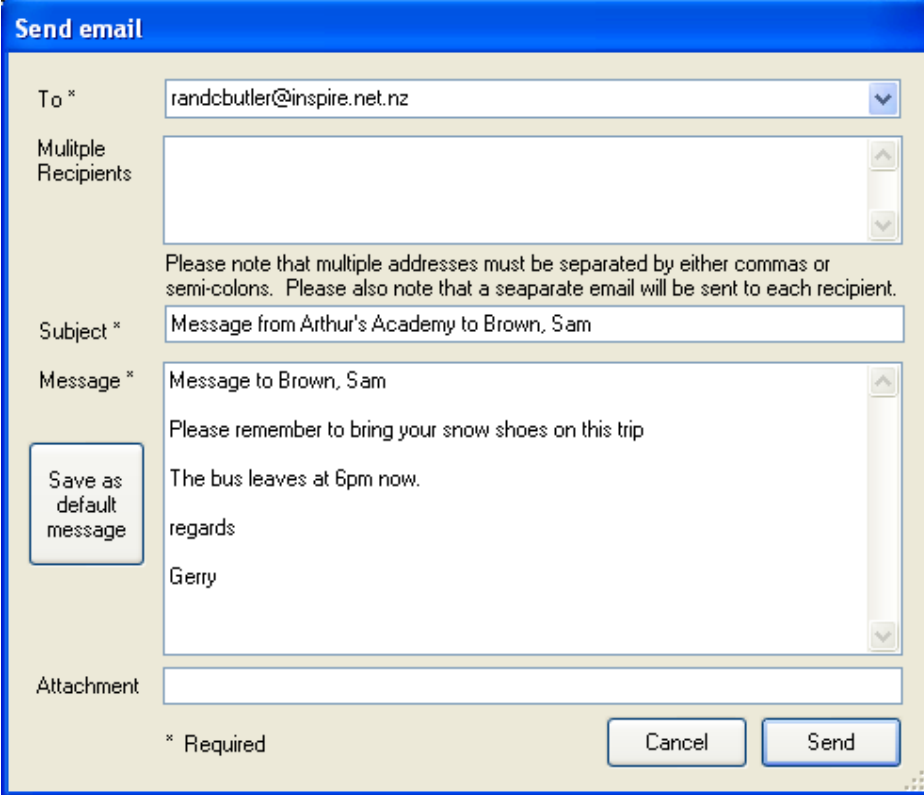
There are three buttons on the right hand side of the meetings details area. These are :



Use this button to delete a meeting.



Use this button to email notification of the meeting to the person. When you click on this button the usual email dialogue will appear as shown below. You may, of course, edit the default message to that of your own.



The 'Send email' dialog box has a blue title bar. It contains several fields: 'To \*' with the email 'randcbutler@inspire.net.nz', 'Multiple Recipients' (empty), 'Subject \*' with 'Message from Arthur's Academy to Brown, Sam', and 'Message \*' with a multi-line text area containing 'Message to Brown, Sam', 'Please remember to bring your snow shoes on this trip', 'The bus leaves at 6pm now.', 'regards', and 'Gerry'. A 'Save as default message' button is to the left of the message text area. Below the message area is an 'Attachment' field. At the bottom are 'Cancel' and 'Send' buttons, and a note '\* Required'.

**Send email**

To \* randcbutler@inspire.net.nz

Multiple Recipients

Please note that multiple addresses must be separated by either commas or semi-colons. Please also note that a seaparate email will be sent to each recipient.

Subject \* Message from Arthur's Academy to Brown, Sam

Message \* Message to Brown, Sam  
Please remember to bring your snow shoes on this trip  
The bus leaves at 6pm now.  
regards  
Gerry

Save as default message

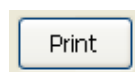
Attachment

\* Required

Cancel Send

The button at the left of the screen allows you to record all but the first line, and this will be retrieved to be included in any future email which you might send. The first line of the message are fixed and will appear each time in the format shown above.




If the person concerned does not have an email address then you will be alerted to this fact.




Use this button to print a document listing the meeting details.

As tasks are yet to be performed, red alerts appear on the day's list warning you of these.

---

Purpose	Before	After
Initial interview		
		



Finally, at the top of the list of meetings are two sets of buttons.

The first pair, either side of the date, enable you to move backwards and forwards, one day at a time. If you really wish to jump well away from the current date then click on the month tab, move to the desired month, and double-click on the desired day. (This is exactly equivalent to opening a small calendar and making a selection from it).

The second three buttons have different purposes.

The first provides a printout of the displayed day's meetings.

The second hides any unallocated time slots, allowing you to see just the meetings which you have for the day.

The third pops up a small screen giving you some hints about the way you can use this screen.

## 10.3 One week at a time

Day Week Month									
← Mon 26 Jan 2009 →		22 appointments		<input checked="" type="checkbox"/> Hide the weekend		How to use this screen		Print week's appointments	
Time	Mon 26 Jan	Time	Tue 27 Jan	Time	Wed 28 Jan	Time	Thu 29 Jan	Time	Fri 30 Jan
8.30am		8.00am		8.00am		8.00am		8.00am	
8.45am		8.15am		8.15am		8.15am		8.15am	
9.00am	Ke [redacted]	8.30am	Gra [redacted]	8.30am		8.30am		8.30am	
9.15am	Bo [redacted] s Luke	8.45am	[redacted] kte	8.45am		8.45am		8.45am	Kil [redacted]
9.30am		9.00am	Law	9.00am	Se [redacted] in	9.00am	Jo [redacted] zel	9.00am	
9.45am	Fe [redacted] gra June	9.15am		9.15am		9.15am		9.15am	Ge [redacted] nah Leigh
10.00am	La [redacted] el	9.30am		9.30am	Yo [redacted] ll John	9.30am		9.30am	
10.15am	TH [redacted] nish	9.45am		9.45am		9.45am		9.45am	
10.30am		10.00am		10.00am		10.00am		10.00am	
		10.15am	Ray [redacted] herine	10.15am		10.15am	Dr [redacted] James	10.15am	Ar [redacted] a Lee
		10.30am		10.30am		10.30am		10.30am	
		10.45am		10.45am		10.45am		10.45am	
		11.00am		11.00am		11.00am		11.00am	

The second tab – 'Week' – displays either five or seven days at a time. An example is shown above. (Rectangles hide student names for this manual).

A tick box in the top row allows you to include or exclude the two weekend days.

Again, there are two pairs of two buttons at the top of the display.

The first pair, either side of the Monday date (which identifies the week) may be used to move backwards and forwards, one week at a time.

The first of the second two buttons provides hints on how best to use this screen. For example, if you click on a day at the top of the table (e.g. Tues 27 Jan) then the display will jump over to the single day display, showing the day which you selected.

If you click on a person name in any one of the days then you will jump back to the single day display and the meeting you clicked will be displayed.

The second, and final, button enables you to print a document listing the week's meetings.

## 10.4 One month at a time

This display shows the current month with a (partial) list of meetings showing in each day. A separate area on the right hand side of the screen is used when you click on a particular day. The full list for the clicked day is displayed here, as shown in the second illustration below.

Day	Week	Month				
January 2009		26 appointments		How to use this screen		
Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
			1	2	3	4
5	6	7	8	9	10	11
8.30am Adams, Oliver						
12	13	14	15	16	17	18
	8.30am Allison, Lance 8.45am Adams, Oliver					
19	20	21	22	23	24	25
9.15am Abernethy, Leearna						
26	27	28	29	30	31	
9.45am Ferguson, Laura June 9.00am Kerr, Robert 10.15am Thomson, John	9.00am Lawson, Daniel 10.15am Rayne, Joanna Catherine 10.15am Rayne, Joanna Catherine	9.00am Secker, Marvin 9.30am Young, Daniel John 9.00am Young, Daniel John	9.00am Jones, Kelsey Hazel 10.15am Dryden, Andrew James 10.15am Dryden, Andrew James	8.45am King, Lauren 9.15am Gerrard, Hannah Leigh 10.15am Amor, Jessica Lee		

Click on the 30<sup>th</sup> Jan and the day's list is displayed at the right hand side of the screen, as shown below.

30/01/2009	
8.45am King, Lauren	
9.15am Gerrard, Hannah Leigh	
10.15am Amor, Jessica Lee	

Once again, at the top of the screen are two lots of buttons.

The first pair may be used to move backwards and forwards, one month at a time.



Using these you can quickly move to any month required.

The other button, once again, reveals a window which provides hints on how best to use this screen.

If you double-click on a day of the month then you will be taken to the single day screen, showing the meetings for that day. (Remember : a single click on a day causes it to be displayed on the right hand side of the month screen).

If you click on a particular meeting in the right hand side list then you will also be taken to the single day view, with the selected meeting being displayed.

## 10.5 Alarms

This display shows any outstanding tasks due to be completed within the next seven days (or however many you change the setting at the top of the screen to).

Appointment Schedule for Worsfold Software Ltd

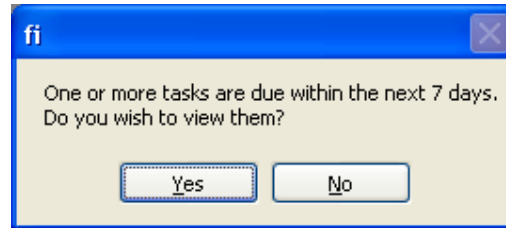
Day Week Month **Alarms**

Things to be done in the next  days [Print table](#)

Student	Appt Date	Due Date	Detail
Fred John	09/02/2009	09/02/2009	Before : Get Policing brochure
Mills n	09/02/2009	09/02/2009	Before : Get nursing brochure
Trev ally	10/02/2009	10/02/2009	Before : Check with polytech about Architectural course

You may print the displayed table of tasks using the suitably labelled button.

Should any tasks be outstanding then a warning will be displayed as you click on the 'meetings' button. An example of the warning is shown below.



# ***Chapter 11***

## **Using the web site**

What's in this chapter?	Page
11.1 Using the Worsfold Software web site	11.1
11.2 Accessing the web site from within the package	11.5
11.3 Installing a downloaded update	11.10

### **11.1 Using the Worsfold Software web site**

Early in 2005 a web site was established to enable users of the Worsfold Software packages to stay up to date with both the latest enhancements and the latest versions of each of our software packages.

If, for some reason, you discover a fault in the software then please check the web site first. It may very well be that others have discovered it before you and it has already been rectified and a new version made available. I won't annoy you with an email every time a small change is made.

The name of the web site is : <http://www.worsfoldsoftware.co.nz>

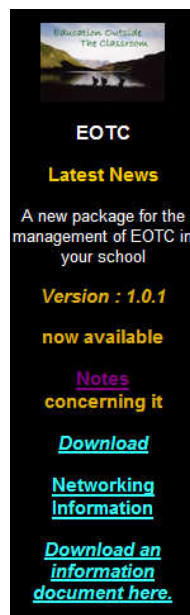
The site has a FAQ (Frequently Asked Questions) page and both background information and package specific information is frequently updated here.

This could well be your first port of call if you have a question concerning the package.

The 'Home' page is shown below.



Users of Education Outside the Classroom should keep an eye on the fifth column, where latest information is added to the top every time a change is made. Links here take you to various places of immediate interest.



At the top of the screen are some buttons....



.. and, while you are welcome to browse them all, the one of most interest to EOTC users is the one labelled 'EOTC', which leads to the package's home page.

This page has four buttons which take you to :

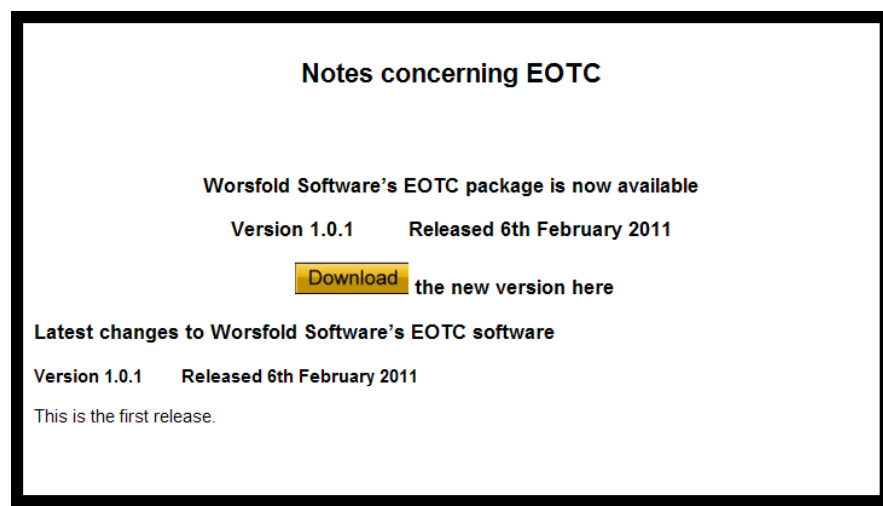
- a) Downloads - from whence you can access the latest version and the manual.

There are four possible downloads.

- 1) The first is the UPDATE process for those who have already installed the package. This is a small download which will provide you with a file : EOTCUpdate.msi. Download it to somewhere suitable (e.g. your desktop – instructions follow shortly in the chapter) and double-click on the downloaded file to run it, then delete the downloaded file.
- 2) The second update is a FULL installation which can be used to evaluate the software. You will be registered as a 'demonstration' version and, should you subsequently purchase the package, then any data you have entered while investigating the package will still be available.
- 3) The third download is the small EOTC Installation Manual
- 4) The fourth download is a .pdf version of this manual.

In the centre of the illustration above you will see a link to 'Instructions on this download process' – further details of which follow in this chapter.

- b) Latest News – which details recent enhancements to the package.



At the time of writing, of course, there have been no changes to the original version.

- c) View Brochure – wherein you can learn more about the package
- d) Order form – where you can find information relating to ordering the package.

**Education Outside the Classroom ordering information**

The cost of the Future Indicative package is : 2011 : \$395.00 + G.S.T.

The cost of Annual licence / User Group support : \$175.00 per year ( \$14.58 per month) + G.S.T.

There is also a standard charge of \$5.11 (incl GST) post and packaging per order.

Orders for EOTC may be sent by :

Phone : to 03 449 2094      Email : to [randcbutler@inspire.net.nz](mailto:randcbutler@inspire.net.nz)

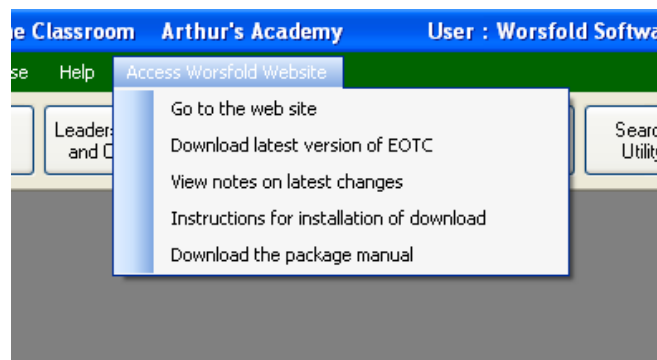
Please do not hesitate to contact us if you require further information

The information required to order the package is :

1. Your centre name
2. Your centre mailing address
3. Your contact name
4. Your contact phone number
5. Your email address

## 11.2 Accessing the web site from within the package

At the top of the main screen there are several menu headings. One of these relates to the web site .



There are five options on the menu.

## 1. Go to the web site

Provided that your computer is on-line (connected to the internet) then clicking this menu option will take you directly to the Worsfold Software Ltd web site.

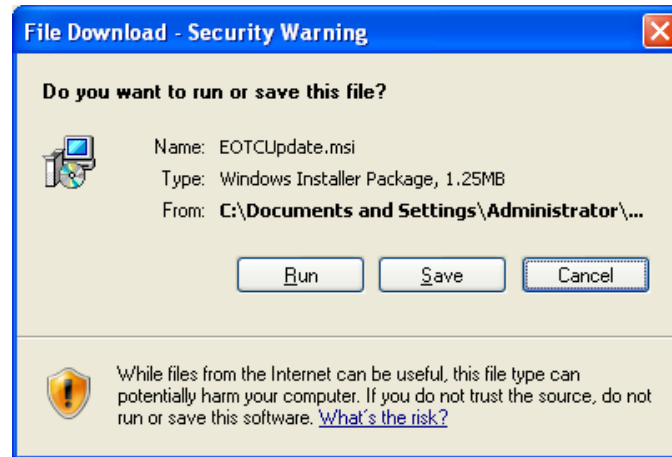


A button at the top of the screen closes the package browser. Remember that while using the package browser you must use the <-Backspace button as a 'back' button to return to a previous web page.

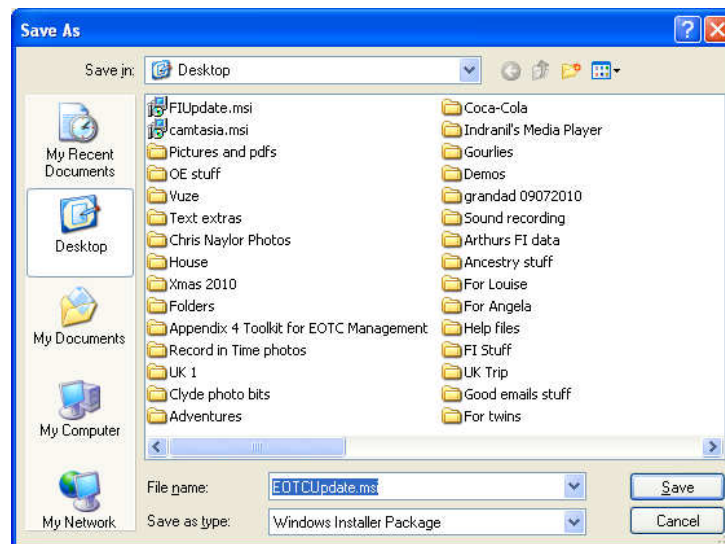
## 2. Download the latest version of EOTC.

This option will result in the appearance of the following window.





Click 'Save' to download the update to your computer....and a window such as that shown below will appear, asking where you wish to store the download.



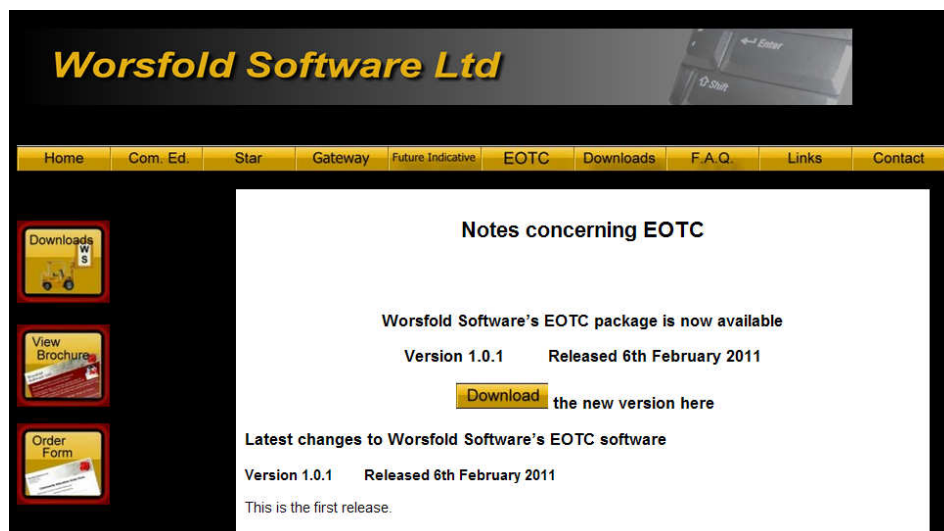
It is usual to save the download to your desktop, so click 'Desktop' on the left hand side of the window, then click 'Save'. As a result, the download file will arrive on your desktop....



See section 11.4 below for full instructions on how to download and install an update.

### 3. View notes on the latest changes

This option will display, in the package browser, the 'Latest news' web page from the Worsfold Software site – relating to Future Indicative. As new releases are issued notes relating to each will be added to the TOP of the display below so that the latest information is always right at the top.



### 4. Instructions for installation of download

These instructions are the same as those in item 2 above. They will be displayed on the package browser.

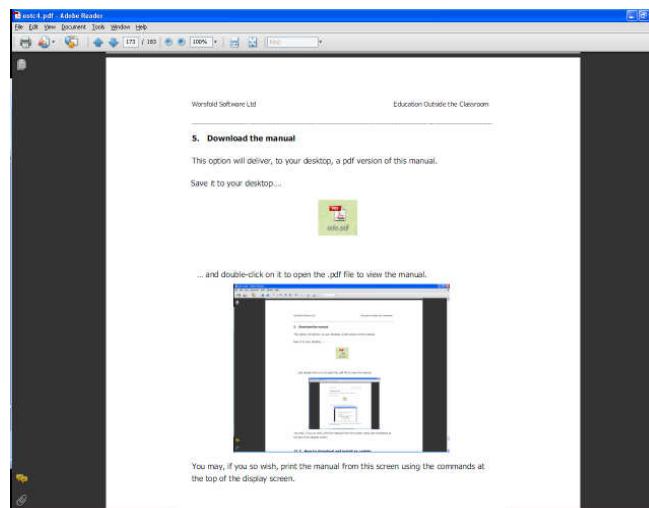
## 5. Download the manual

This option will deliver, to your desktop, a pdf version of this manual.

Save it to your desktop....



... and double-click on it to open the .pdf file to view the manual.



You may, if you so wish, print the manual from this screen using the commands at the top of the display screen. Please note that the above image includes an image of itself which includes an image of itself. (I stopped there...)

## 11.3 How to download and install an update

This is the process you must use to download an updated version of the program from the Worsfold Software Ltd web site and to install it on to your computer.

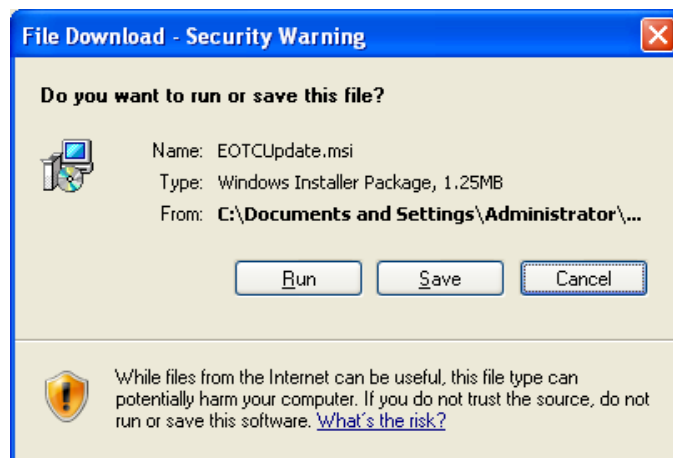
**N.B. To install a new version you MUST NOT have the program running. Close the program (if it is running) before installing an update.**

### Downloading

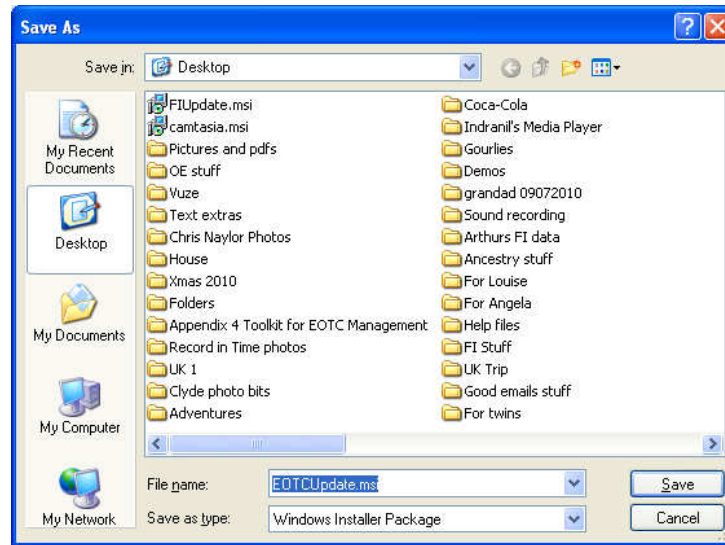
This process was detailed above and is repeated here.

Regardless of which way you access the download (via the package menu item or from the web site via your own browser) you will be given the option to 'Open' or 'Save' the download.

Select the 'Save' option and save it to your desktop.



Click 'Save' to download the update to your computer....and a window such as that shown below will appear, asking where you wish to store the download.



It is usual to save the download to your desktop, so click 'Desktop' on the left hand side of the window, then click 'Save'. As a result, the download file will arrive on your desktop....



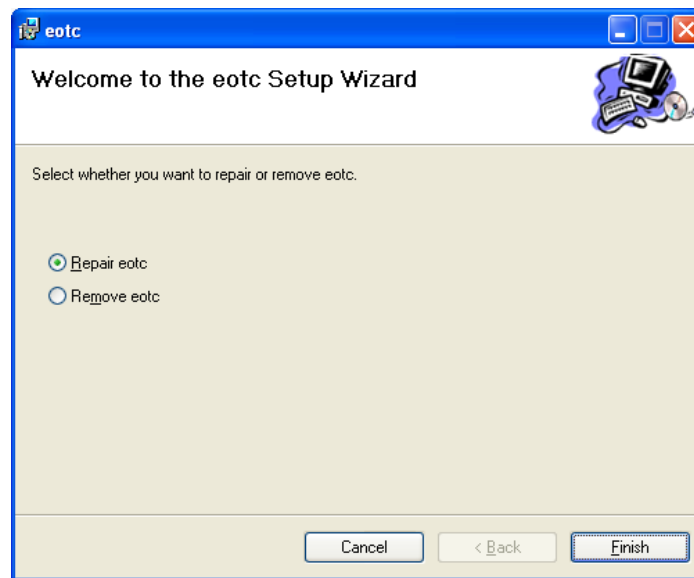
The download will consist of the file : EOTCUpdate.msi

That's the first part of the process.

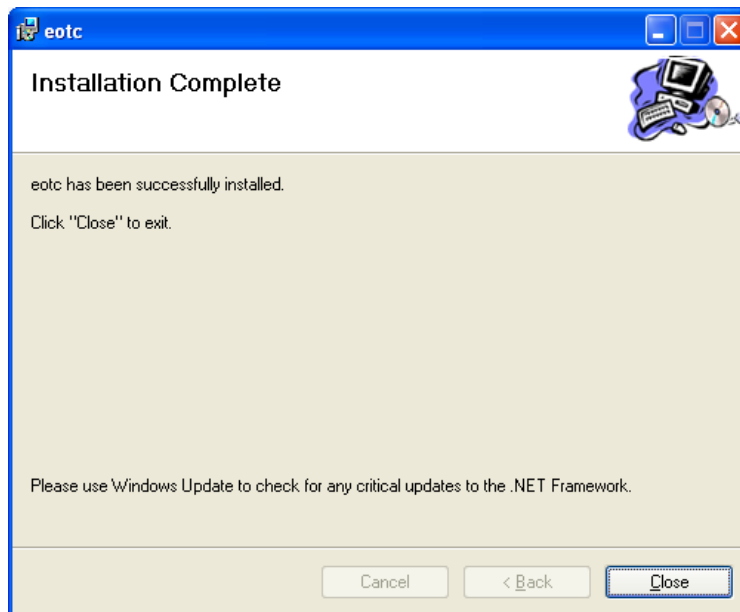
## Installation

To get the new version of the program double-click on the downloaded file, and the installation dialogue will appear as shown below.

The screen below indicates that the process has found the package on your computer and allows you to 'Repair' it by installing the latest version.



Click 'Finish' to complete the installation process. A progress bar will appear, but very quickly you should arrive at the final screen :



Click 'Close' and you are ready to begin using the new version.



# ***Appendix One***

## **Sample Documents**

In this appendix you will find examples of all of the standard documents.

These examples may also be viewed from within the package by visiting Configuration / Risk levels / Attached documents – and clicking on the 'View' buttons in the right hand table.

There are many pages of examples here. You may alter these documents to meet your own needs via 'Printing utility' / 'Document design'





## Arthur's Academy

## EOTC and Sports Events : Approval in Principle

1.0

**Information:** Complete this form and give it to the EOTC Coordinator. The coordinator will then pass it on to the principal to sign off approval in principle. You then need to follow up EOTC Event Approval systems. Remember that all paperwork is due in two weeks prior to the event.

<b>Event title</b>	Catching fish			<b>Location of Event</b>	Clutha River		
<b>Person in Charge</b>	Hay, Elizabeth	<b>Code</b>	HY	<b>Approximate cost per student</b>	16.8		

<b>Term</b>	Term 2: Hols	<b>Time Period</b> Tick all that apply	Period	<input checked="" type="checkbox"/>	<b>Staffing</b> Tick all that apply	Teachers	<input checked="" type="checkbox"/>	<b>Outside Contractor</b>	Aires, Roger
	Week 3		Half day	<input checked="" type="checkbox"/>		Parents	<input checked="" type="checkbox"/>		<b>Contact</b>
<b>Curriculum Area(s)</b>	History Mathematics	<b>Time Period</b> Tick all that apply	School hours	<input checked="" type="checkbox"/>	<b>Staffing</b> Tick all that apply	Volunteers	<input checked="" type="checkbox"/>	<b>Role</b>	To fly higher than anyone ever has
			Whole day	<input checked="" type="checkbox"/>		Coaches	<input checked="" type="checkbox"/>		
			Evenings	<input checked="" type="checkbox"/>		Contractors	<input checked="" type="checkbox"/>		
			Overnight	<input checked="" type="checkbox"/>		Senior leaders	<input checked="" type="checkbox"/>		
			Multi-day	<input checked="" type="checkbox"/>		Student Teachers	<input checked="" type="checkbox"/>		
Weekend	<input checked="" type="checkbox"/>	Work Placement	<input checked="" type="checkbox"/>						
			Holidays	<input checked="" type="checkbox"/>					

<b>Type of Event</b> Tick all that apply	Curriculum	<input checked="" type="checkbox"/>	<b>Accommodation</b> Tick all that apply	Motel	<input checked="" type="checkbox"/>	<b>Transport</b> Tick all that apply	By foot	<b>I have entered this event on to the term planner</b> <input checked="" type="radio"/> Yes <input type="radio"/> No	
	Outdoor Pursuits	<input checked="" type="checkbox"/>		Camping ground	<input checked="" type="checkbox"/>		By bikes		<b>The EOTC Coordinator has been informed of this event</b> <input checked="" type="radio"/> Yes <input type="radio"/> No
	Sports trip	<input checked="" type="checkbox"/>		Hotel	<input checked="" type="checkbox"/>		By van(s)		
	Club	<input checked="" type="checkbox"/>		Tents	<input checked="" type="checkbox"/>		Staff vehicle(s)	<b>Approved by Principal</b> Yes <input type="radio"/> No <input checked="" type="radio"/>	
	Cultural	<input checked="" type="checkbox"/>		Backpackers	<input checked="" type="checkbox"/>		Adults driving cars/kans		<input checked="" type="checkbox"/>
	Arts	<input checked="" type="checkbox"/>		Cabins	<input checked="" type="checkbox"/>		By bus		<input checked="" type="checkbox"/>
	Water	<input checked="" type="checkbox"/>		Billets	<input checked="" type="checkbox"/>		Students driving car(s)	<input checked="" type="checkbox"/>	
	Alpine / Bush	<input checked="" type="checkbox"/>		Host families	<input checked="" type="checkbox"/>		Students driving students	<input checked="" type="checkbox"/>	
	Urban	<input checked="" type="checkbox"/>							

<b>(Signed)</b>	<b>Date of approval</b>
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Printed on Worsfold Software's Education Outside The Classroom software



Arthur's Academy

## Event Proposal

1.1

**Event : Catching fish****Teacher in Charge : Hay, Elizabeth****STAGE 1: APPROVAL IN PRINCIPLE**

To the teacher in charge:

EITHER ( )

We are satisfied with the proposed planning, organisation and staffing of the EOTC event. We give approval to go ahead and plan the event.

Please ensure that we have all relevant information including: a final list of students, staff and volunteers; details of parental consent; a detailed itinerary (including maps) at least seven days before the group is due to leave.

Your report and evaluation of the EOTC event, including details of any incidents, should be with us as soon as possible but no later than 14 days after the group returns.

OR ( )

We require the following information or specific changes before approval in principle can be given.

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**STAGE 2: FINAL APPROVAL**

We are satisfied with the planning for the EOTC event. We give approval for the event to go ahead.

Board of trustees or delegate's name: \_\_\_\_\_

Board of trustees or delegate's position: \_\_\_\_\_

Signed: \_\_\_\_\_ Date: \_\_\_\_\_



**EOTC  
LOGO**

Arthur's Academy

## Event Approval

**2.0**

Event: Catching fish

Person in Charge: Hay, Elizabeth

The PIC should complete this form at the outset of planning for the EOTC activity. The PIC should already have received approval in principle for the proposed activity.

When approval is given, one copy of this form should be retained by the approver and another by the PIC. The principal/board should be informed of any subsequent changes in planning, organisation and/or staffing.

### 1. Purpose of EOTC event

Purpose

### 2. Specific learning outcomes and curriculum links

History  
Mathematics

### 3. Site/s where event will take place

Clutha River

### 4. Dates and times

Date of Departure: 05/05/2010

Date of return: 07/05/2010

Time of Departure: 8.30am

Time of return: 4.30pm

### 5. Transport arrangements: Include names of transport company, volunteer drivers and vehicle registration numbers.

We will all be travelling by bike to the depot and then going on foot to the foothills where we will catch a bus before flying by helicopter to the edge of the bush.

### 6. Details of outside provider/s to be used in the EOTC activities (if any).

Contractor: Aires, Roger  
Address: 4 John Street, Levin  
Phone: 03 445 6789 021 345 6789

Contractor : Sir Edmund Hillary Outdoor Pursuits Centre (Organisation)  
Address : 15 feet north, South Face, Mount Everest  
Phone : 07 654 3212 021 666 5555

**7. Proposed cost and financial arrangements.**

Financial

**8. Details of programmed activities.**

We are going to climb trees  
and swing from the branches  
and throw hula hoops at the monkeys

**9. Details of any hazardous activity and the associated planning, organisation and staffing (please attach RAMS or SAP or similar form/s).**

(See attached)

**10. Names, relevant experience, qualifications and specific responsibilities of staff accompanying the group.**

Butler, Rory  
Crayford, Elizabeth  
Cameron, Ros  
Pearson, Carol

**11. Names, relevant experience, qualifications and specific responsibilities of other adults accompanying the party.**

Ms Tania Sladen(990157) \Mr Peter Dudley(990157) \Mr Richard Bateup(984301) \Mrs Lynda Duff(983338) \Mr Kelvin Duff(983338) \Mr Graeme Butler(983970) \Mr Jeff Marr(984074) \Mrs Philippa Avery(983912) \Mrs Denise Aitken(990017) \

**12. Name, address and telephone number of the school contact person who holds all information about the EOTC event in case of emergency.**

School contact : Cameron, Leslie  
Address : 4 John Street, Levin, Manawatu  
Phone : 06 345 6789 021 1234 567

**13. Existing knowledge of EOTC event site and whether a pre-visit is intended.**

Lots of knowledge there

**14. Size and composition of the group:**

Age range : 14-15

Maximum number of males : 5      Maximum number of females : 6

Activity leader/participant ratio : 1 : 4

**15. Information on parental consent:**

Consent may precede or follow approval. Please attach copy of information being sent to parents and the parental consent form.

(See attached)

**16. Names and brief details of students with special educational or medical needs:**

(See attached)

Teacher in charge full name: Hay, Elizabeth

Signed: \_\_\_\_\_ Date: \_\_\_\_\_



Arthur's Academy

## Event Planning Checklist

3.0

Event : Catching fish

Person in charge : Hay, Elizabeth

Have you?	Yes / No / N/A
1. Followed the approval process if required?	( ) ( ) ( ) ( )
2. Identified your specific objectives and noted the learning outcomes you expect and any pre-event teaching required?	( ) ( ) ( ) ( )
3. Established a budget?	( ) ( ) ( ) ( )
4. Had student costs approved?	( ) ( ) ( ) ( )
5. Arranged for permission to pre-visit the site?	( ) ( ) ( ) ( )
6. Pre-visited the site and checked the facilities?	( ) ( ) ( ) ( )
Booked the venue if necessary?	( ) ( ) ( ) ( )
7. Collated a list of participants?	( ) ( ) ( ) ( )
8. Worked out how many staff, parent helpers, or student leaders will be needed?	( ) ( ) ( ) ( )
9. Met ratios set by the principal and EOTC coordinator and committee and are these consistent with best practice?	( ) ( ) ( ) ( )
10. Found out what prior experience or knowledge the students will need to participate safely.	( ) ( ) ( ) ( )
11. Arranged for and received written parental consent and health information from parents/caregivers?	( ) ( ) ( ) ( )
12. Filed parental consent and health information forms?	( ) ( ) ( ) ( )
13. Arranged for children to bring appropriate clothing and/or equipment?	( ) ( ) ( ) ( )
14. Raised funds?	( ) ( ) ( ) ( )
15. Identified the time required for travel?	( ) ( ) ( ) ( )
16. Identified the time required for activities, tasks and experiences in	( ) ( ) ( ) ( )

the programme? ( ) ( ) ( ) ( )

17. Carried out risk identification and safety management procedures (eg SAP, RAMS)? ( ) ( ) ( ) ( )

**Make sure all activity leaders and assistants:**

1. Have been checked out and vetted if necessary. ( ) ( ) ( ) ( )
2. Are aware of their responsibilities and what is expected of them. ( ) ( ) ( ) ( )
3. Have a list of the student's names that they are directly responsible for and health Have a copy of the event programme. ( ) ( ) ( ) ( )
4. Have a copy of the event programme. ( ) ( ) ( ) ( )
5. Are aware of the pick up, drop off points and times. ( ) ( ) ( ) ( )
6. Have appropriate experience and skills for assigned tasks. ( ) ( ) ( ) ( )
7. Have ready access to a first aid kit (ideally, each activity group should have their own first aid kit). ( ) ( ) ( ) ( )

**Transport**

Are drivers required?

1. Do they comply with the school transport policy? ( ) ( ) ( ) ( )
2. Do they require a map or route to get to the destination? ( ) ( ) ( ) ( )
3. Is public transport being used? ( ) ( ) ( ) ( )
4. Has it been booked and confirmed? ( ) ( ) ( ) ( )
5. Are drivers aware of pick up and drop off points? ( ) ( ) ( ) ( )
6. Do you need to allow for transportation problems? eg. Dense traffic, winter and road conditions? ( ) ( ) ( ) ( )

**Equipment**

Have you:

1. Analysed students' medical information and collated lists for group leaders? ( ) ( ) ( ) ( )
2. Arranged a first aid kit for each activity leader, plus individual medication where needed? ( ) ( ) ( ) ( )
3. Established first aid and emergency procedures? ( ) ( ) ( ) ( )
4. Obtained safety and emergency equipment? ( ) ( ) ( ) ( )
5. Arranged to take a mobile phone or other communication device, fully charged with spare battery? ( ) ( ) ( ) ( )

6. Familiarised yourself with emergency services in the area? ( ) ( ) ( ) ( )
7. Left route details and trip details with the school contact? ( ) ( ) ( ) ( )

#### **Outside contractors and instructors**

Checking them out:

1. Has the Contracting Checklist (form 14) and the agreement between school and outside provider (form 15) been completed and returned and a contract in place? ( ) ( ) ( ) ( )
2. Are the leaders competent in the activities they will be leading? ( ) ( ) ( ) ( )
3. Are they qualified in first aid? ( ) ( ) ( ) ( )
4. Can they communicate in a manner appropriate to the students? ( ) ( ) ( ) ( )
5. Are they familiar with the terrain and equipment to be used? ( ) ( ) ( ) ( )
6. Have their referees been contacted? ( ) ( ) ( ) ( )
7. Were they recommended? ( ) ( ) ( ) ( )

#### **Review and evaluation**

1. Has a debrief been held with all staff, contractors and volunteers involved in the event to discuss:
- Incidents? ( ) ( ) ( ) ( )
- Improvements for future? ( ) ( ) ( ) ( )
- What worked well, positive outcomes of the EOTC event? ( ) ( ) ( ) ( )
2. Has this been documented and filed with management? ( ) ( ) ( ) ( )
3. Have the educational objectives and expected learning outcomes been assessed, achieved and communicated to families? ( ) ( ) ( ) ( )
4. Has a student participant evaluation been done? ( ) ( ) ( ) ( )
5. Has a report been put into the school newsletter? ( ) ( ) ( ) ( )
6. Are any special projects or followup activities being done to extend learning from the event? ( ) ( ) ( ) ( )





Arthur's Academy

## Parent Checklist

4.0

### Information for Parents and caregivers

Parents should be sent information about EOTC events especially in the 'higher-risk' categories. This will usually include a cover letter, the parental consent and health forms.

#### 1. Cover letter

Following is a checklist of items to consider including in the cover letter. Not all items may be relevant for all events.

Item to be included	Yes	No	N/A
• learning outcomes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• event dates	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• departure and return times and location/s	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• clothing and equipment required	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• dates to return consent and health forms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• cost details	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• transport arrangements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• venue/accommodation details, including address and phone number	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• security and supervision arrangements including any times when remote supervision may take place (ie adults not actually with students)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• the nature and size of the group	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• emergency and contingency plans	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• details of first aid cover and provision for additional support for medical needs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• procedures if anyone becomes ill	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• staffing including relevant experience and qualifications related to activity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• activities and of how significant risks will be managed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• school rules, event rules (code of conduct) and discipline procedures (eg, smoking, alcohol, illegal drugs, unsafe behaviour policies)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• what not to take or bring back	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- money to be taken, arrangements for safekeeping and pocket money (primary schools) ( ) ( ) ( )
- on exchange visits, host school approval of the host families ( ) ( ) ( )
- insurance details and whether parents need to arrange additional cover ( ) ( ) ( )
- policy on the use of phones, both mobile and landline, during events ( ) ( ) ( )

It is important that the Parental Consent and Risk Disclosure and Health Profile and Medical Consent forms are completed by all adult and student participants in the EOTC event, to meet school health and safety responsibilities.

The purpose of the forms is to enable the school to ensure that optimal staffing levels are provided, the specific needs of participants are met, and the educational value and safety of events is maximised.

Details on these forms will remain confidential to school staff, contractors and volunteers associated with supervising activities on the EOTC event.

For safety reasons, please provide us with information that is accurate and complete.

Please return these forms to the school by: \_\_\_\_/\_\_\_\_/\_\_\_\_

---

## 2. Parental consent, emergency contacts, and risk disclosure

See Sample form 6.

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## 3. Health profile and medical consent

See Sample form 7.

NB. A separate form should be completed for each person attending the event.



Arthur's Academy

## Blanket Consent Guidelines

5.0

### Blanket Consent for EOTC

Please amend this document to meet your own requirements

To the Parents / Gaurdians of James Alan Adam

(Please remove the option below which does not apply)

#### Option 1:

I give my general approval for the student enrolled to participate in off-site programmes of learning, within his or her normal classroom time allocation and approved by the principal.

#### Option 2:

Education Outside The Classroom (EOTC) is the name given to all events/activities that occur outside the classroom, both on and off the school site. This includes sport.

- Our school believes in using a range of environments and experiences to enhance our students' learning.
- We have ready access to the beach, rivers, mountains, and the bush in our area and beyond. We are also close to various built environments in our community. These areas are rich learning environments for our students both in and out of school. They need to learn how to be safe. Our school also values the concept of providing students with opportunities. Thus some of the learning for students occurs beyond the school site and this document is seeking your consent for your child/ren to participate in such learning

Our school uses the following Event Risk Categories

Level 1	On site - in the school grounds - Low risk environments Examples : Sports day, painting murals, horticulture Consent : None required
Level 2	On site - in the school grounds - Higher risk environments Examples : School pool or climbing wall Consent : Blanket consent
Level 3	Off site - Local community within school hours - Low risk environments Examples : Museum, art gallery, sports and recreation events Consent : Blanket consent
Level 4	Off site - Local community within school hours - Higher risk environments Examples : Aquatic (river / beach), cross country running Consent : Blanket consent
Level 5	Off site - Day trips may extend out of school hours - Low risk environments Examples : Fam visit, day hike, city visit, ferry trip, swimming in pools Consent : Blanket consent

- 
- |         |   |
|---------|---|
| Level 6 | Off site - Day trips may extend out of school hours - Higher risk environments<br>Examples: Skiing, waka ama, rock climbing, field trips with chemicals or heavy machinery<br>Consent: Separate consent and risk disclosure                   |
| Level 7 | Off site - Residential multi-day trips further afield - Low risk environments<br>Examples: Trip to another region, sports tournaments, visits to historic sites<br>Consent: Separate consent  |
| Level 8 | Off site - Residential multi-day trips further afield - Higher risk environments<br>Examples: Overseas trip, field trips to natural water/bush/alpine environments, outdoor pursuit journeys<br>Consent: Separate consent and risk disclosure |

All EOTC activity categories require staff to undertake an analysis of the risks, and identify the management strategies required to eliminate, isolate and minimise the risks. Emergency procedures are also in place.

#### BLANKET CONSENT

I / we agree to the participation of James Alan Adam in lower risk categories 1 to 5

EOTC events while a student at "Your school name here"

I/we have provided the school with up to date medical, supervision and learning information through the enrolment form and will make every endeavour to keep this information current.

Name: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Name: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_



Arthur's Academy

## Blanket Consent Guidelines

5.1

### Blanket Consent for EOTC

Please amend this document to meet your own requirements

To the Parents / Guardians of James Alan Adam

(Please remove the option below which does not apply)

#### Option 1:

I give my general approval for the student enrolled to participate in off-site programmes of learning, within his or her normal classroom time allocation and approved by the principal.

#### Option 2:

Education Outside The Classroom (EOTC) is the name given to all events/activities that occur outside the classroom, both on and off the school site. This includes sport.

- Our school believes in using a range of environments and experiences to enhance our students' learning.
- We have ready access to the beach, rivers, mountains, and the bush in our area and beyond. We are also close to various built environments in our community. These areas are rich learning environments for our students both in and out of school. They need to learn how to be safe. Our school also values the concept of providing students with opportunities. Thus some of the learning for students occurs beyond the school site and this document is seeking your consent for your child/ren to participate in such learning.

Our school uses the following Event Risk Categories

Level 1	On site - Low risk environments Examples: Class activities Consent: None required
Level 2	Off site occurring within one day - Low risk environments Examples: History trips, Theatre, farm visits Consent: Blanket consent
Level 3	Off site occurring within one day - Higher risk environments Examples: Skiing, agricultural trips involving chemicals Consent: Event-specific approval
Level 4	Sport - indoor and outdoor Examples: Night sports events, Wednesday sport, sports exchanges Consent: Blanket consent
Level 5	Recreational swimming Examples: Surfing

---

	Consent : Event-specific approval
Level 6	Overnights Examples : Camps, sports exchanges, field trips Consent : Event-specific approval
Level 7	Outdoor Education Examples : Kayaking, tramping Consent : Event-specific approval
Level 8	Overseas Examples : Sports trips, Class trips Consent : Event-specific approval

All EOTC activity categories require staff to undertake an analysis of the risks, and identify the management strategies required to eliminate, isolate and minimise the risks. Emergency procedures are also in place.

#### **BLANKET CONSENT**

I / we agree to the participation of James Alan Adam in lower risk categories 2 and 4

EOTC events while a student at 'Your school name here'

I/we have provided the school with up to date medical, supervision and learning information through the enrolment form and will make every endeavour to keep this information current.

Name: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Name: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_



Arthur's Academy

## Blanket Consent Guidelines

5.2

### Blanket Consent for EOTC

Please amend this document to meet your own requirements

To the Parents /Gaurdians of James Alan Adam

(Please remove the option below which does not apply)

#### Option 1:

I give my general approval for the student enrolled to participate in off-site programmes of learning, within his or her normal classroom time allocation and approved by the principal.

#### Option 2:

Education Outside The Classroom (EOTC) is the name given to all events/activities that occur outside the classroom, both on and off the school site. This includes sport.

- Our school believes in using a range of environments and experiences to enhance our students' learning.
- We have ready access to the beach, rivers, mountains, and the bush in our area and beyond. We are also close to various built environments in our community. These areas are rich learning environments for our students both in and out of school. They need to learn how to be safe. Our school also values the concept of providing students with opportunities. Thus some of the learning for students occurs beyond the school site and this document is seeking your consent for your child/en to participate in such learning

Our school uses the following Event Risk Categories

Enter your own risk categories or specific events here

Level 1	On site - Low risk environments - Local Examples: Inter-house cricket Consent: No
Level 2	Off site occurring within one day - Low risk environments - Around town Examples: Inter-college cricket Consent: No
Level 3	Off site occurring within one day - Higher risk environments - Around the Country Examples: Exchange-college cricket Consent: Coordinator
Level 4	Overseas events Examples: Australian school cricket Consent: Principal
Level 5	Description:

Examples:  
Consent:

Level 6    Description:  
              Examples:  
              Consent:

Level 7    Description:  
              Examples:  
              Consent:

Level 8    Description:  
              Examples:  
              Consent:

All EOTC activity categories require staff to undertake an analysis of the risks, and identify the management strategies required to eliminate, isolate and minimise the risks. Emergency procedures are also in place.

#### **BLANKET CONSENT**

I / we agree to the participation of James Alan Adam in lower risk categories 2 and 4

EOTC events while a student at 'Your school name here'

I/we have provided the school with up to date medical, supervision and learning information through the enrolment form and will make every endeavour to keep this information current.

Name: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Name: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_





**EOTC  
LOGO**

**Arthur's Academy**

## Parental Consent and Details **6.0**

### Event Details

Title : Catching fish  
 Location : Clutha River  
 Start date : 05/05/2010 Time : 8.30am  
 Finish date : 07/05/2010 Time : 4.30pm

### Participant Information Form

Please complete these details:

Name : James Alan Adam Student ID : 990167  
 Address : 49 Johns Terrace  
 Wainuiokapa  
 Telephone : 467 7654 Mobile : 021 345 6789  
 Year or class level : 11 Age : 18  
 Form Teacher : 24/11/1993  
 Family Doctor : Doctor : Ames  
 Phone : 345 6789  
 Address : Taranua Medical Centre  
 Community Services Card number : 12345-6789-0987-543  
 Medic Alert number (if applicable) : 76715

THIS FORM OR A COPY MUST BE TAKEN ON THE EVENT. A COPY SHOULD BE RETAINED BY THE SCHOOL CONTACT.

### Emergency Contact Details (please provide at least 2 sets of contact details)

#### Contact 1: Emergency Contact

Name : Ms Tania Adam Relationship : Mother  
 Address : 139 Muttontown Road  
 Clyde  
 Central Otago  
 Upper Moutere

Day Phone : 06 456 7654 Work Phone :  
 Mobile :

#### Contact 2 : Alternative contact

---

Name : Mr Peter Adam                      Relationship :    Father  
Address :        139 Muttontown Road  
                     Clyde  
                     Central Otago  
                     Upper Moutere  
Home Phone : 03 466 7654                      Work Phone : \_\_\_\_\_  
Mobile : \_\_\_\_\_

---

To be read and signed by adult assistant or parent/caregiver of child participant.

**Parental Consent**

I agree to my child/myself taking part in the EOTC event and have received sufficient information on which to base a decision. I agree to their/my participation in the activities described. I acknowledge the need for them/me to behave responsibly.

**Acknowledgement of Risk**

I have read the EOTC event information sheet and I understand that there are risks associated with involvement in school EOTC events and that these risks cannot be completely eliminated. I understand that the school will identify any foreseeable risks or hazards and implement correct management procedures to eliminate, isolate or minimise those hazards. I understand my child has been involved in the development of safety procedures. I will do my best to ensure that my child follow these procedures.

I know that I am able to ask any questions of the school about the activities my child will be involved in, to gain a better understanding of the risks involved. I recognise that participation in such activities is voluntary and not mandatory through a 'challenge by choice' \* procedure. My child and I both understand that they may withdraw from an activity if they feel at risk. This must be done in consultation with the person in charge.

I understand that the school does not accept responsibility for loss or damage to personal property and that it is my responsibility to check my own insurance policy.

Name : \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

\* 'challenge by choice' means the participant chooses their own level of challenge within a supportive peer environment.



**EOTC  
LOGO**

## Arthur's Academy

### Health Profile and Medical Consent (Staff)

**7.0**

Please note : This profile is designed to assist with the care of all participants on EOTC events  
One form to be completed for EACH participant.

Name : James Alan Adam

Medic Alert Number : 76715

#### 1 Please tick if you have any of the following :

Migraine	Diabetes	Chronic nose bleeds	
Colour blindness	Epilepsy	Travel sickness	
Heart condition	Asthma	Fits of any type	
Dizzy spells			

Other (Please specify) \_\_\_\_\_

\* Required for overnight events only

#### 2 Medication details

Condition/allergy	Medication details
-------------------	--------------------

#### 3 Allergies

Prescription Medication	Food	Insect bites/stings	
Other allergies			

#### 4 Is a Health Plan required

Yes ( ) No ( ) (If 'Yes' then see Document 9)

**5 Have you had any major injuries** (breaks or strains) or illness (glandular fever etc) in the last six months that may limit full participation in any activities? Yes ( ) No ( )

If 'Yes' then provide details of the injury / illness.

\_\_\_\_\_

\_\_\_\_\_

---

**6 Date of last tetanus injection :** 12/10/2008

**7 Dietary Requirements**

Jelly babies  
for all  
the time

**8 What pain/flu medication may be given if necessary ?**

Paradol  
Aspirin  
Minties  
Lollies

**9 To the best of your knowledge, Has Jimmy been in contact with any contagious or infectious diseases in the last four weeks?**

Yes ( ) No ( )

If 'Yes' then provide details

---

---

---

**10 Is there any information the staff should know to ensure the physical and emotional safety of you/your child? (For example 2 cultural practices; disability; anxiety; about heights/darkness/small spaces; pregnancy; behaviour or emotional problems).**

Check with the dean daily  
if not hourly.

---

**Blanket Consents** (These consents are assumed to apply for the current year)

Agreement to :	Consent
Agreement to administer medications if necessary	



**EOTC  
LOGO**

**Arthur's Academy**

## Medications Administered

**8.0**

Student : \_\_\_\_\_

Date	Time	Medication	Dosage	Signed

Student : \_\_\_\_\_

Date	Time	Medication	Dosage	Signed



**EOTC  
LOGO**

**Arthur's Academy**

## Health Care Plan

**9.0**

Source: Health Conditions in Education Settings - Supporting Children and Young People.  
MoE (2006). For more information on how to use this form go to: <http://www.minedu.govt.nz/>

### Time period covered by this plan

From : 03/03/2010

To : 09/09/2010

Student : James Alan Adam

School : Your school name here

Date of Birth : 24/11/1993

Gender : Male

### Health condition or diagnosis

Warts on his nose

### Symptoms or health needs

Hat falling down over ears

### What child/student must not do because of his/her health conditions

Wear a funny hat at all times

### Daily care needs at school: people, tasks, equipment

Dean / Counsellor and ointment

### Family/Whānau contact/s

#### Parent/Caregiver 1

Name : Ms Tania Adam

Address : 139 Muttontown Road  
Clyde  
Central Otago  
Upper Moutere

Home ph: 06 456 7654

Work ph: \_\_\_\_\_

Mobile : \_\_\_\_\_

#### Parent/Caregiver 2

Name : Mr Peter Adam

Address : 139 Muttontown Road  
Clyde  
Central Otago

**Where copies of the emergency procedures are kept (who has a copy)**

In the cupboard in B12 and Joan has the key





**EOTC  
LOGO**

**Arthur's Academy**

## Aquatic Activity Consents

**10.0**

For activities where being able to swim is essential

***Consent does not remove the need for activity leaders to ascertain the level of the students' swimming ability for themselves.***

Event:      Catching fish

Student:    James Alan Adam

Swimming ability	Yes	No	Don't know
Is your child able to swim 50 metres?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Is your child water confident in a pool?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Is your child confident in deep water?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Is your child able to tread water?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Is your child able to survival float?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Is your child confident in the sea or open inland water?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Is your child safety-conscious in and around water?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

I would like James Alan Adam to take part in this event.

Signed \_\_\_\_\_ Date \_\_\_\_\_

Full name of parent/caregiver \_\_\_\_\_

N.B. The activity leader should take this form or a copy on the event. A copy should be retained by the school contact. Consider the need to gain similar information from adult participants as well.



**EOTC  
LOGO**

**Arthur's Academy**

## **Student Contract**

# **11.0**

To be developed by, read and signed by all participating students

Event:      Catching fish

Student:    James Alan Adam

I understand that this event is an opportunity for me to learn, practise skills and gain attitudes and values in an environment outside the classroom. I realise that this requires me to take on genuine responsibility for my own learning and safety and that of others.

I agree to do the following to make this happen:


- Show courtesy and consideration to others
- Follow the rules and instructions of activity leaders and assistants at the event, including travel to and from the event
- Take part in all activities within challenge-by-choice\* options
- Look after myself and my personal belongings
- Declare medical conditions that could affect participation in the event
- Accept the rules set by the school for the event, even if they are different from what is accepted at home

I understand that my parents/caregivers will be contacted and I may be sent home at their expense if

- My actions are considered unacceptable by staff
- I breach the school drugs and alcohol policy
- My actions put me or others in any danger

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

\* 'challenge by choice' means the participant chooses their own level of challenge within a supportive peer environment.

 <b>EOTC LOGO</b>	<b>Arthur's Academy</b>  <b>Activity Leader/Assistant Competence</b>	12.0
---	--	------

**Activity leader/assistant competence**

*To be completed by all adult participants.*

Event:      Catching fish

Name:      Rory Butler

Category:   Teacher   Activityleader   Other School Staff   Assistant   \_\_\_\_\_

**Skills/experience/qualifications:**

Qualification	Current	Not Current	Notes (recent experience)
Car driver's licence	Yes		
Passenger service licence	Yes		
First Aid Certificate		Yes	Type : First Aid Certificate Valid until : 12/06/2010 Date lapsed : 13/12/2010
Teacher registration	Yes		
Life saving Certificate	Yes		Type : Life Saving Cert Valid until : 10/10/2010 Date lapsed : 12/12/2010

**Instructor/coaching qualifications relevant to the activity** (list below or attach):

Qualification	Issued by	Notes
NZOIA Abseil Leader	NZDA	Date gained : 03/03/2008 Type : Cert
NZOIA Cave 1	NZDA	Date gained : 05/05/2009 Type : Card
NZOIA Bush Walking Leader	ST John	Next due : 05/05/2011 Last refresher : 06/06/2010 Notes : Carefully tested
Search Methods		

**Swimming ability**

Swimming ability      Yes      No

Can you swim 200m confidently and competently?      ☒      ☐

Can you tread water for three minutes?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Could you swim out in deep water and rescue a student?	<input checked="" type="checkbox"/>	<input type="checkbox"/>

**Other significant skills or experience relevant to the activity** (list below, or attach):

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

I certify that the above information is correct.

Signed : \_\_\_\_\_

Date : \_\_\_\_\_

Your  
school's**EOTC  
LOGO****Arthur's Academy****Volunteer Assistant Agreement****13.0**

*To be read and signed by all volunteer assistants on an EOTC event. These may be kept on file and used repeatedly.*

**For parents/caregivers and other volunteers who have been invited to assist on the event**

Event: Catching fish

Name: Rory Butler

Address: 4 John Street  
Levin  
ManawatuTelephone: (home) 06 356 3344  
(mobile) 021 445 0455**Either**

I am the parent/caregiver of \_\_\_\_\_


**Or**

I am a volunteer (please tick) ( )

As a volunteer assistant in the school EOTC event

- I am willing to comply with requests of staff and will follow safety procedures they have set.
- I am willing to assist in aspects of running the event, based on information I have supplied on the Activity Leader and Assistant Competence form (form 12)
- I agree there is no place for alcohol or non-prescription drugs on a school EOTC event
- I accept the terms of my involvement as stated above.

Signed \_\_\_\_\_ Date \_\_\_\_\_

 <b>EOTC</b> <b>LOGO</b>	Your school's <b>Arthur's Academy</b>	<div style="border: 1px solid black; padding: 5px; display: inline-block;"> <b>Contracting Checklist</b> </div>	<b>14.0</b>																														
<p>Form to be completed by each contracted organisation</p> <p>The following checklist is sent to you as an outside provider to help assess the level of safety management expertise provided by your organisation.</p> <p>Please return this form to _____ by _____</p> <p>Organisation: Sir Edmund Hillary Outdoor Pursuits Centre</p> <p>Contact person: Edmund Hillary</p> <p>Address: 15 feet north South Face Mount Everest</p> <p>Phone: 07 654 3212      Cell: 021 666 5555      Fax:</p> <p>Email:</p> <p>Length of time as contractor:</p> <p><b>Please complete the following:</b></p> <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 60%;"></th> <th style="width: 10%; text-align: center;">Yes</th> <th style="width: 10%; text-align: center;">No</th> </tr> </thead> <tbody> <tr> <td>1. Do you have selection standards for your staff?</td> <td style="text-align: center;"><input checked="" type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/></td> </tr> <tr> <td>    ▪ What are the standards?</td> <td></td> <td></td> </tr> <tr> <td colspan="3">They must all pass our rigorous initiation process.</td> </tr> <tr> <td>2. Do you have training standards for your staff?</td> <td style="text-align: center;"><input checked="" type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/></td> </tr> <tr> <td>    ▪ What are the standards?</td> <td></td> <td></td> </tr> <tr> <td colspan="3">Yes - they all have School Cert prior to 1950.</td> </tr> <tr> <td>3. Do these standards comply with nationally accepted best practice</td> <td style="text-align: center;"><input checked="" type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/></td> </tr> <tr> <td>4. Does your organisation regularly monitor compliance with these</td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;"><input checked="" type="checkbox"/></td> </tr> <tr> <td>    ▪ How?</td> <td></td> <td></td> </tr> </tbody> </table> <p>No - once you've got School Cert they can't take it away.</p>					Yes	No	1. Do you have selection standards for your staff?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	▪ What are the standards?			They must all pass our rigorous initiation process.			2. Do you have training standards for your staff?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	▪ What are the standards?			Yes - they all have School Cert prior to 1950.			3. Do these standards comply with nationally accepted best practice	<input checked="" type="checkbox"/>	<input type="checkbox"/>	4. Does your organisation regularly monitor compliance with these	<input type="checkbox"/>	<input checked="" type="checkbox"/>	▪ How?		
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▪ How?																																	

Your organisation's safety procedures		Yes	No
1. Are records kept of incidents (fatality, near miss, injury, illness, property damage, behavioural problems)?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
2. Are logs kept of equipment use?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
3. Is there a safety/risk management plan (eg RAMS or SAP) and standard operating procedures (SOPS) for each activity?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
4. Safety/risk management plans and SOPS (including emergency procedures) for all activities this school will be involved in are attached.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
5. Can you confirm that personnel allocated for this event meet accepted best practice standards for all activities they will lead?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	

**Referees:**

Please provide the names and contact details of two supporting referees that your organization has supplied services to in the past.

**Referee 1**

Name: Jimbo Everready

Address: 26 Chandler Crescent  
Clyde

Phone: 06 398 4567

**Referee 2**

Name: \_\_\_\_\_


Address: \_\_\_\_\_

Phone: \_\_\_\_\_

The information supplied above is correct.

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

Name: \_\_\_\_\_ Position: \_\_\_\_\_

 <b>EOTC LOGO</b>	<b>Arthur's Academy</b> <div style="border: 1px solid black; padding: 5px; margin: 5px auto; width: 80%;"> <b>Agreement between School and Provider</b> </div>	15.0
<p><b>Agreement between school and provider (organisation or individual)</b></p> <p>Event :      Catching fish</p> <p>This is an agreement between</p> <p>School      Arthur's Academy</p> <p>and</p> <p>Provider : _____</p> <p>For the provision of the following services:</p> <p>The provider will take all reasonable practicable steps to ensure the health and safety of the school students, staff and assistants attending this event (Health and Safety in Employment Act 1992, Section 1.1, 1.2.1, and 1.2.2).</p> <p><b>Please tick all information you have attached</b></p> <p><b>Provider responsibilities - provide the school with the following:</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> How the expected learning outcomes of the activities will be met.</li> <li><input type="checkbox"/> A description of the supervision structures, including experienced staff to student ratios required for each activity (that meet relevant best practice requirements).</li> <li><input type="checkbox"/> Student supervision policies that the school must comply with.</li> <li><input type="checkbox"/> Safety/risk management plans and SOPs, eg RAMS, SAP or similar for each activity.</li> <li><input type="checkbox"/> Staff profiles that include relevant qualifications/experience (see over).</li> <li><input type="checkbox"/> Details of facilities and equipment to be provided.</li> <li><input type="checkbox"/> A written quote for the equipment and services to be provided.</li> <li><input type="checkbox"/> A learning environment that is safe for the students and meets the stated educational outcomes.</li> <li><input type="checkbox"/> A list of equipment and clothing required by students for the activities.</li> <li><input type="checkbox"/> The preparation required by students to participate safely in the activities.</li> </ul>		



**School Responsibilities - provide the provider with the following:**

- ☐ The intended learning outcomes that are based on the achievement objectives in the relevant curriculum areas.
- ☐ Opportunity to be involved in planning, implementation and evaluation stages of event.
- ☐ Name and contact numbers of the liaison person for this event.
- ☐ Adequate staff and supervisors to meet best practice requirements (see over).
- ☐ Details of facilities and equipment supplied by the school (if applicable).
- ☐ Health and behavioural profiles of the students involved in the event.
- ☐ Copy of student contract.
- ☐ Adequately prepared and equipped students (gear checked).
- ☐ Appropriate support for students with special needs.

**The school or provider reserves the right to withdraw any or all participants from the event if safety is compromised.**


Signed \_\_\_\_\_ (For school) Date \_\_\_\_\_

Name \_\_\_\_\_

Signed \_\_\_\_\_ (For provider) Date \_\_\_\_\_

Name \_\_\_\_\_

**NB: The school requires that a male and female activity leader or assistant must be available at all times for overnight supervision or where students are using changing rooms (eg sports events or public swimming pools) if the event includes both male and female students. The school requires that a minimum of two activity leaders or approved assistants be on site at all times.**

 <b>EOTC LOGO</b>	<b>Arthur's Academy</b> <div style="border: 1px solid black; padding: 5px; display: inline-block; background-color: #fff9c4;"> <b>Outside Provider</b> </div>	<b>16.0</b>
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**Contract for Services**

*Schools often find it necessary to employ extra staff for EOTC activities. This draft may be a starting point for that process. Schools will need to add clauses to cover matters relevant to their circumstances, for example, reimbursement for expenses, use of equipment, acknowledgement of school policy, termination of service etc.*

This is an agreement between

The school:            Arthur's Academy

and

The contractor:       Sir Edmund Hillary Outdoor Pursuits Centre

Contract start and end dates

Start date: \_\_\_\_\_ Time: \_\_\_\_\_

End date:    \_\_\_\_\_ Time: \_\_\_\_\_

**Contractor's role: Services to be provided**

The Contractor will provide the services set out in this schedule. The Contractor will provide those services to accepted best practice standards.

The Contractor will meet the requirements of Health and Safety in Employment legislation; be enthusiastic and promote the school when dealing with the public and the providers of service to the school.

Daily starting and finishing times are

Start \_\_\_\_\_ Finish: \_\_\_\_\_

A lunch break of 30 minutes will be provided each day ☐

OR

This event requires student supervision and lunch to occur concurrently ☐

**Payment**

The school will pay the Contractor for \_\_\_\_\_ hours at \$ \_\_\_\_\_ incl GST per hour

OR

The school will pay the Contractor the sum of \$ \_\_\_\_\_ incl GST upon receipt of an invoice

**Declaration**

I declare that I do not have any convictions relating to dangerous driving, violent or sexual offending, and I agree to police vetting if required.

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

Full Name: \_\_\_\_\_

*When sub-contracting occurs between providers for an EOTC event, for example:*


- *Party A - parents/school*
- *Party B - lead provider*
- *Party C - 2nd provider sub-contracted by lead provider*
- *Party D - ultimate provider sub-contracted by 2nd provider*

*There may be no direct contractual relationship between Party A and Party C or D. Therefore, we suggest it would be good practice to set up a series of specific contractual responsibilities in each contract that reflect the key concerns for party A (related to the safety of students).*

*This would protect the relationship between each party (C with B as well as D). Each contract should ideally have an 'up and down' protection built in too, so D could protect itself from any sub-standard conditions imposed or implied by C or B.*

*For example, each contract could contain a clause such as:*

*'The subcontract shall not be approved by the contractor unless the contractor is satisfied that the standard of care ultimately provided to students meets current accepted practice standards (best practice standards) and that a clause to this effect shall be contained in any sub-contract.'*

**Arthur's Academy**

**RAMS - Hazard Assessment and Control**

17.0


Event : Catching fish      Location : Clutha River

Risks What could go wrong?	Hazards Why would this happen?	Significant? Yes / No	Controls How can we prevent it?
A horse could jump over the fence	Billy Bunter could scare it	Yes	Don't take Billy on the trip

**RAMS Review Process**

Reviewed by : \_\_\_\_\_ Date : \_\_\_\_\_

Signed : \_\_\_\_\_

 <b>EOTC</b> <b>LOGO</b>	<b>Arthur's Academy</b>		<b>18.0</b>
	<b>RAMS - Risk Management Plan</b>		
School : Arthur's Academy			
Event : Catching fish			
Location : Clutha River			
Person in charge : Hay, Elizabeth			
Departure date and time : 05/05/2010 8.30am    Return date and time : 07/05/2010 4.30pm			
<b>Risks (significant potential losses)</b>			
1 In a logging area so trees might fall on us		2 Pihraha could be in the lake	
3 Wild crocodiles abound		4	
<b>People</b>			
Skills, attitudes, age, fitness, ratios, experience, health etc			
<b>Causal factors</b>		<b>Risk reduction strategies</b>	
Lack of staff/leader training		Training of staff/leaders/volunteers in RM of activity	
Lack of staff/leader training		Training of staff/leaders/volunteers in programming/sequencing	
Lack of staff/leader training		Training of staff/leaders/volunteers in site specific procedures	
Lack of staff/leader training		Instructor/staff NZOIA Bush 1 or equivalent	
Lack of staff/leader training		Leader has completed RM course	
Failure to disclose risks		Brief participants re risks and hazards	
Inappropriate language/behaviour		Brief participants re expectations and rules	
Fatigue/stress		Brief participants re expectations and rules	
Fatigue/stress		Systems in place (e.g. buddy/distance)	
Fatigue/stress		Trump within individuals ability	
Lack on van driving experience		Employ competent driver	
Blisters		Carry suitable blister treatment	
Blisters		Warn students concerning suitable footwear	
<b>Equipment</b>			
Clothing, shelter, activity specific gear, safety gear etc			
<b>Causal factors</b>		<b>Risk reduction strategies</b>	

Inappropriate clothing	Check appropriateness of clothing
Missing equipment	Regular equipment checks
Missing equipment	Use checklist for final checks
Lack of rescue gear	Carry rescue gear
Lack of rescue gear	Use checklist for final checks
Bad fits : blisters	Advice re blisters pre-trip
Bad fits : blisters	Carry suitable blister treatments
Inappropriate food	Carry suitable quantities of appropriate food
Careless use of stoves	Pre-trip briefing on use of equipment
Careless use of stoves	Pre-trip practice with equipment
Careless use of stoves	Check stove prior to use
Lack of petrol	Check vehicles for petrol
Check equipment list	First aid / rescue gear
Check equipment list	map and compass
Check equipment list	Thermos / cold water
Check equipment list	Snow foam
Check equipment list	Full zip sleeping bag
Check equipment list	Spare clothing
Check equipment list	Bivibag / tent/Rope/Spare food
Check equipment list	inhalers
Check equipment list	Wasp sting kit
Check equipment list	billy
Check equipment list	Gas cooker/lighter
Check equipment list	Repair kit

## Environment

Weather, terrain, water, seasons etc

Causal factors	Risk reduction strategies
Weather unsuitable - wet	Dress for weather and advise group
Weather unsuitable - wet	Reschedule in certain conditions
Terrain unsuitable or changeable	Keep to track
Terrain unsuitable or changeable	Follow leader's route when bush bashing
Fragile environment	Minimum impact code to be discussed
Weather unsuitable - wind / wind chill	Dress for weather and advise group
Weather unsuitable - wind / wind chill	Reschedule in certain conditions
Difficult environments	Disclose risks - Briar/bush lawyer risks
Difficult environments	Disclose risks - Dislodging materials on to other below
Difficult environments	Disclose risks - Wasp stings / allergic students to travel directly behind leader
Difficult environments	Disclose risks - No pushing on downhill
Difficult environments	Disclose risks - Ankle injuries on bush bash
Difficult environments	Disclose risks - Slides on rock outcrops
Difficult environments	Disclose risks - Passing on instant risk warnings to others
Difficult environments	Disclose risks - Steady pace through gorge
Difficult environments	Disclose risks - Disclose giardia risk
Difficult environments	Disclose risks - Current conditions

## Transport

Vehicles, driving, on board behaviour etc

Causal factors	Risk reduction strategies
Driver inattention	Use defensive driving code of practice
Driver unlicensed	Employ competent driver
Driver unlicensed	Driver must have appropriate license for vehicle
Driver dehydration	Drink plenty of fluids
Travel sickness	Regular stops for group
Travel sickness	Set vulnerable students up front
Travel sickness	Carry appropriate medications
Travel sickness	Carry sickness bags
Not wearing lifejackets	Monitor life jacket use
Passenger(s) unwell	Circulate health profiles for everyone (including adults) to drivers

**Critical incident management**

Emergency procedures to manage each identified risk	Emergency gear required
<b>Injury or medical issue</b>	
Stop the party, assess and treat patient, manage rest of party, monitor and reassure. Consult appropriate service(s) (Police/Ambulance/Hospital/Doctor)	First aid kit Cell phone(s) Shelter
<b>Bad Public relations</b>	
Discuss with relevant people, police if necessary, file incident report, alert principal	Cell phone Follow up to relevant agency/person
<b>Loss of participant</b>	
Stop the group, establish where/when last seen and state of mind, complete written details, carry out search of immediate area as practical, seek assistance	Document details of incident Map of area Relevant authorities
<b>Environmental damage</b>	
Intervene if students are wilfully or unknowingly damaging the environment and disposing of rubbish in an inappropriate way	Incident report follow up
<b>Death of participant/staff/others</b>	
Secure and cover victim, manage and reassure group, alert relevant authorities, alert school to initiate emergency management plan, refer media to principal	Outside agencies School crisis management plan HELP beacon/cell phone
<b>Prosecution / Civil action</b>	
Keep accurate notes of all interactions and communications with everyone concerned. Access assistance from school and PPTA and any relevant agencies	Liability insurance



**National Standards applicable**

Safety & EOTC : A good practice guide for New Zealand Schools 2002  
 Health and Safety in Employment Act 1992  
 Education Act 1989  
 Top extra

**Policies and guidelines recommended**

Safety & EOTC : A good practice guide for New Zealand Schools 2002  
 Health and Safety in Employment Act 1992  
 Education Act 1989  
 Top extra

**Minimum skills required by leader or staff**

Core competencies for EOTC:	Desirable personal attributes include:
Leadership skills	Communication and empathy skills
First aid certification	Flexibility and motivation
Ability to identify and manage risks	Assertiveness and ability to say 'No'
Crisis management skills	Approachability
Environmental awareness skills	Safety conscious
Awareness of cultural values	Sound judgement and problem solving skills
Previous experience in trip/area	Good self concept
Group management skills	Ability to assess group dynamics
more left	more right

Final approval                      Accept (    )                      Not yet achieved (    )

Comments (Note : Near miss incidents/accidents/hazards previously recorded)

\_\_\_\_\_


\_\_\_\_\_

**RAMS Review Process**

Reviewed by : \_\_\_\_\_ Date : \_\_\_\_\_

Signed : \_\_\_\_\_





**Arthur's Academy**

**EOTC LOGO**

**SAP - Safety Action Plan**

**19.0**

Event : Catching fish      Person in charge : Hay, Elizabeth


Departure Date and Time : 05/05/2010 8.30am      Return date and time : 07/05/2010 4.30pm

Number of staff : \_\_\_\_\_ Number of helpers : \_\_\_\_\_ Number of students : \_\_\_\_\_

What significant things could go wrong?	What could cause it to go wrong?	How could we prevent it from going wrong?	Whose responsibility is it?	When/where will it be done?	Emergency Plan
The bicycles might have flat tyres	Jimmy could have forgotten to pump them up	Watch Jimmy like a hawk	Jimmy Barnes	Outside cycle surgery	Jenny will carry a spare pump
The bicycle bells might not work	Lack of oil in the mechanism	Ask Judy to oil them	Jill Usher	Before we leave	Jenny will carry spare oil

Approved by : \_\_\_\_\_ Date : \_\_\_\_\_

Signed : \_\_\_\_\_



**Arthur's Academy**

**EOTC LOGO**

**Participants Summary**

**20.0**

Event : Catching fish      Person in charge : Hay, Elizabeth


Location : Clutha River

Start date : 05/05/2010      End date : 07/05/2010

Details intentionally blanked

Summary of Participant Information

Family Name	First Names	Date of Birth	Address	Net of kin	Contact	Relevant Medical Information
Aitken	Se	13/06/1994	3 ..... race M..... Wellington			
Adcock	Ka	9/11/1993	2 ..... road R..... Christchurch 7614			
Aiken	Je	7/07/1995	6 ..... e Av Christchurch 8042			
Adam	Jir	24/11/1993	4 ..... rrace V ..... a	Mrs Tania A ..... am Mother	Hme:06 4 ..... 34	Diabetes~Mild~[Chronic nose bleeds~Severe~Keeps cotton wool at his side at all times] Epilepsy~Moderate~Tablets in his satchel]
Adcock	Br	7/01/1992	2 ..... Pool Road R..... Christchurch 7614			
Alesana	Ti Pi	25/10/1992	8 ..... set S..... Nelson	Mrs Tania A ..... a		Colour blindness~Mild~[ Migraine~Severe~]



**Arthur's Academy**

**EOTC  
LOGO**

**Participants Summary**

**20.1**

Event: Catching fish

Person in charge: Hay, Elizabeth

Details intentionally blanked


Location: Clutha River

Start date: 05/05/2010

End date: 07/05/2010


Summary of Participant Information

No.	Surname	First name	Cell	DOB	Address
1	Aitken	Sarah	021 112 3344	13/06/1994	32 Cumberland Terrace, Mirimar, Wellington
Caregiver 1	Mrs Tania	Swim 50m	No	Doctor:	Ames
Relationship	Adam	Swim pool	Yes	Tetanus date	12/10/2008
Home phone	Mother	Deep water	No	Panadol OK	Yes
Work phone	06 456 7654	Tread water	Yes	Emgcy Trtmt OK	Yes
Cell phone		Survive float	No	Costs OK	Yes
		Swim in sea	Yes		
		Swim safe	No		
					Medical conditions: Diabetes Mild [Chronic nose bleeds Severe Keeps cotton wool at his side at all times] Epilepsy Moderate Tablets in his satchel
					Comm Services Card: 12345-6789-0987-543
					Medic Alert No.: 76715
No.	Surname	First name	Cell	DOB	Address
2	Adcock	Ka		9/11/1993	25 B 614
Caregiver 1		Swim 50m	Yes	Doctor:	St t
Relationship		Swim pool	No	Tetanus date	11/03/2007
Home phone		Deep water	Yes	Panadol OK	No
Work phone		Tread water	No	Emgcy Trtmt OK	No
Cell phone		Survive float	No	Costs OK	Yes
		Swim in sea	No		
		Swim safe	No		
					Medical conditions:
No.	Surname	First name	Cell	DOB	Address
3	Aiken	Jes		7/07/1995	6 Hc 2


 <b>EOTC</b> <b>LOGO</b>	<b>Arthur's Academy</b>		<b>21.0</b>
	<b>Event Emergency Phone Numbers</b>		
Event : Catching fish		Location : Clutha River	
Start date : 05/05/2010		End date : 07/05/2010	
It is useful to compile a list of applicable emergency numbers prior to an EOTC event. Put copies with each cell phone taken and the landline telephone so they are accessible to all supervisors during the event.			
<b>People in charge if an incident occurs</b>			
On site : Hay, Elizabeth		At School : Cameron, Leslie	
Cell phone : 021 456 7654		Cell phone : 021 1234 567	
<b>Emergency contact</b>	<b>Name</b>	<b>Telephone</b>	
Emergency Services		111	
Principal		School: Home: Mobile:	
Board of trustees chairperson		Work: Home: Mobile:	
School media spokesperson		School: Home: Mobile:	
Nearest doctor - medical centre			
Nearest hospital – emergency department			
Nearest police station			
Community constable			
Department of Conservation	Jim	03456789	
Mountain radio service			
Nearest fire station			
Regional council			
National poisons centre			
Camp manager			
Coast guard			
Civil Defence			
Rape Crisis			
Child, Youth and Family Service (CYFS)			
Animal Control			

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Meteorological Service		
School Trustees Association		0800 STA HELP
Department of Labour		
Group Special Education		
Group Special Education (Ministry of Education) Traumatic Incident Help		0800 TI HELP
Surf club		

 <b>EOTC</b> <b>LOGO</b>	<b>Arthur's Academy</b>		<b>22.0</b>
	<b>Venue / Facility Safety</b>		
Event :	Catching fish	Person in charge :	Hay, Elizabeth
Start date :	05/05/2010	End date :	07/05/2010
<b>Venue / Facility Safety</b>			
Location :	Clutha River		
Venue:	_____		
Address:	_____		
Distance from school:	_____		
Staffmember assessing venue:	_____		
Organisation:	_____	Liaison person/contact:	_____
Activity 1	_____		
Activity 2	_____		
Activity 3	_____		
Activity 4	_____		
Activity 5	_____		
Activity 6	_____		
Activity 7	_____		
Activity 8	_____		
Activity 9	_____		
Activity 10	_____		

<b>List of activities you propose to use at venue:</b>	<b>Yes</b>	<b>No</b>
1. Is the venue appropriate for activities planned?	( )	( )
2. Is there suitable vehicle access for emergencies?	( )	( )
3. Is there a supply of drinking water on site?	( )	( )
4. What communication is available at the venue in an emergency?	( )	( )
5. Communication method/s available:		
• Landline phone	_____	
• Mobile	_____	
• VHF radio	_____	
• Other	_____	

 <b>EOTC LOGO</b>	<b>Arthur's Academy</b> <div style="border: 1px solid black; padding: 5px; display: inline-block; margin-top: 10px;"> <b>Transport Safety and drivers</b> </div>	<b>23.0</b>
<p>Transport Safety and Drivers</p> <p><b><i>This form is for use when students are to be transported for a school EOTC event in a private vehicle. It clarifies the relationship between the school and the driver.</i></b></p> <p>Transport of students by:    volunteer / contractor / school staff    (please circle)</p> <p>Event:            Catching fish            Person in Charge :    Hay, Elizabeth</p> <p>Location:        Clutha River</p> <p>Start date :    05/05/2010            End date :            07/05/2010</p> <p>1. Name of Driver _____</p> <p>2. You hold an appropriate current driver's licence/s for the vehicle you will be driving <input type="checkbox"/></p> <p>3. Your licence is:</p> <ul style="list-style-type: none"> <li>▪      Full car Licence <input type="checkbox"/></li> <li>▪      Passenger Service Licence <input type="checkbox"/></li> <li>▪      Large passenger service and heavy traffic <input type="checkbox"/></li> </ul> <p>4. The vehicle you are driving is registered <input type="checkbox"/></p> <p>5. Vehicle registration number _____</p> <p>6. The vehicle you are driving is roadworthy and has a current:</p> <ul style="list-style-type: none"> <li>▪      Warrant of Fitness <input type="checkbox"/></li> <li>OR</li> <li>▪      Certificate of Fitness <input type="checkbox"/></li> </ul> <p>7. The vehicle you are driving is covered by one of the following insurances:</p> <ul style="list-style-type: none"> <li>▪      Third party property <input type="checkbox"/></li> <li>▪      Comprehensive <input type="checkbox"/></li> </ul>		

8. I agree to adhere to all the road rules

☐

9. Each person in the vehicle will use a seat belt (if fitted and required)

☐

10. The seating capacity of the vehicle will not be exceeded

☐

I acknowledge the above information is accurate

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

Name: \_\_\_\_\_


**COPY RETAINED AT SCHOOL AND COPY FOR DRIVER**

The following information is to be entered when passengers are allocated

Event: Catching fish

Passenger 1	
Passenger 2	
Passenger 3	
Passenger 4	
Passenger 5	
Passenger 6	
Passenger 7	
Passenger 8	
Passenger 9	
Passenger 10	





**EOTC  
LOGO**

**Arthur's Academy**

**Transport Safety and drivers**

**23.1**

***This form is for use when students are allocated to a vehicle or vehicles. It deals with the relationship between the school and the vehicle driver.***

Event:      Catching fish      Person in Charge :    Hay, Elizabeth

Location:    Clutha River

Start date :    05/05/2010      End date :      07/05/2010

Vehicle \_\_\_\_\_ Driver \_\_\_\_\_

Private car / Minibus

**School vehicles :** For insurance purposes the driver is required, on the first time they drive for a school EOTC event, to show their licence to the school office prior to the event. This is recorded in the register of licenced drivers and ensures that employees, contractors and volunteers are insured while at the wheel.

**Private vehicle:** Insurance of the car is the responsibility of the owner. Those offering the school use of their vehicle should notify their insurance company at the time of 'insurance renewal' that their car is occasionally used to transport their son/daughter and/or other students on school events. Teachers should do this too.

It is mandatory that the driver and each passenger is wearing a seat belt.

Student names (one per seat up to ten (in the case of an eleven-seat minibus))

Passender 1	
Passender 2	
Passender 3	
Passender 4	
Passender 5	
Passender 6	
Passender 7	
Passender 8	
Passender 9	
Passender 10	

The driver (teacher, support staff, volunteer, contractor) must:

- Be responsible for the behaviour of the students at all times
- Adhere to all the road rules (remember you the driver are responsible for any transgressions and the consequences)

Return this form to: \_\_\_\_\_ upon returning to school

Indicate the type of insurance held for the vehicle.

- ☐ Full insurance
- ☐ Third party insurance

Sign here as acknowledgement that:

- ☐ The vehicle has a current WOF
- ☐ The vehicle has a current registration
- ☐ My driver licence is current.
- ☐ My driver licence number is \_\_\_\_\_
- ☐ My insurance policy is current

Signature \_\_\_\_\_ Date \_\_\_\_\_





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**Arthur's Academy**

## Transport Permissions

**23.2**

Complete one or more of the following and return to \_\_\_\_\_ by \_\_\_\_\_

### **A. Permission to travel in a vehicle driven by a named student, staff member, or assistant**

I give permission for my child Caitlin Addison

to travel in a car driven by \_\_\_\_\_

for the Catching fish trip to Clutha River Date \_\_\_\_\_

Signed by Parent/Guardian \_\_\_\_\_ Date \_\_\_\_\_

Name \_\_\_\_\_

### **B. Permission to drive car on school EOTC event**

I give permission for my child Caitlin Addison

to drive his / her / my car

for the EOTC trip to Clutha River Date \_\_\_\_\_

Signed by Parent/Guardian \_\_\_\_\_ Date \_\_\_\_\_

Name \_\_\_\_\_

### **C. Permission for a student driver to carry students in a car on an EOTC event**

I give permission for my child Caitlin Addison to carry the following students

1 \_\_\_\_\_ 2 \_\_\_\_\_ 3 \_\_\_\_\_

4 \_\_\_\_\_ 5 \_\_\_\_\_ 6 \_\_\_\_\_

for the EOTC trip to Clutha River Date \_\_\_\_\_

Signed by Parent/Guardian \_\_\_\_\_ Date \_\_\_\_\_

Name \_\_\_\_\_ Contact number \_\_\_\_\_



**EOTC  
LOGO**

**Arthur's Academy**

## Transport Risk Management

**23.3**

### **Students Driving Other Students and Students as Passengers Being Driven by Other Students**

Dear Parent/Caregiver

#### **STUDENTS WHO DRIVE CARS AND MOTORCYCLES ON EOTC TRIPS**

The school is responsible for the safety of all students from the time they leave home to the time they return home. This includes the safety of students who may choose to drive or are driven to and from Education Outside the Classroom (EOTC) activities.

Some of our activities are based some distance from school and it can be difficult for students to get there, participate and return to school in time to get to timetabled classes. The cost of bus transport is often high, and is awkward to manage.

Some students have been driving by car or by scooter to various school activities without permission and we are concerned about safety and parents being informed of the use students are making of vehicles. Students driving or being driven to EOTC activities is not essential in many cases as these are often within walking distance. Vehicle use, however, does mean they have more practical time at the activity.

One solution is to give special permission for students to drive to these activities with parental approval.

If you wish your son/daughter to use or travel in a student driven vehicle to and from a particular venue or location as required as part of an organised EOTC activity we would like you to complete the enclosed permission form. Your son/daughter should return this to the school office for processing.

#### **STUDENTS TRAVELLING IN VEHICLES DRIVEN BY OTHER STUDENTS**

Where such arrangements have been made the school also requires the completion of the enclosed permission form.

#### **RISK MANAGEMENT**

Please note that it is parents' responsibility to ensure that their son/daughter has a vehicle that has a current WOF, has the appropriate insurance and is registered and to ensure that if they grant permission for their son/daughter to be a passenger in a vehicle driven by another student that the vehicle has a current WOF, is registered, insured and the driver has the appropriate license to carry passengers.


We will brief students on expected behaviour, risks associated with access to the location concerned and general driving etiquette.

#### **CLOTHING FOR STUDENTS WHO RIDE MOTORCYCLES**

We wish to draw your attention to the safety of students on motorcycles, in particular the wearing of protective clothing. Lightweight summer clothing leaves the body open to horrific injuries in the event of a crash and we recommend that your son/daughter wear protective clothing over their school uniform, so that no part of the body is exposed and all parts are covered with strong abrasion-proof fabric.

Yours faithfully

Principal

 <b>EOTC LOGO</b>	<b>Arthur's Academy</b> <div style="border: 1px solid black; padding: 5px; text-align: center; background-color: #fff9c4;"> <b>EOTC Management Self Audit Checklist</b> </div>	24.0						
<table style="width: 100%;"> <tr> <td style="width: 33%;">Event :     Catching fish</td> <td style="width: 33%;">Location :   Clutha River</td> <td style="width: 33%;"></td> </tr> <tr> <td>Start date :   05/05/2010</td> <td>End date :   07/05/2010</td> <td></td> </tr> </table>			Event :     Catching fish	Location :   Clutha River		Start date :   05/05/2010	End date :   07/05/2010	
Event :     Catching fish	Location :   Clutha River							
Start date :   05/05/2010	End date :   07/05/2010							
<b>Learning outcomes</b> <div style="margin-left: 20px;"> <input type="checkbox"/> Process requiring clearly stated learning outcomes and curriculum links for each EOTC event  <input type="checkbox"/> Assessment </div>								
<b>Approval</b> <div style="margin-left: 20px;"> <input type="checkbox"/> EOTC event approval process that identifies who the board has delegated this responsibility to (principal, and/or senior staff, and/or EOTC coordinator, and/or Sport and recreation coordinator). <ul style="list-style-type: none"> <li>▪ Pre-approval (for planning to go ahead)</li> <li>▪ Final approval (for event to go ahead)</li> </ul> </div>								
<b>Staff, students, contractors and volunteers</b> <div style="margin-left: 20px;"> <input type="checkbox"/> Staff competence assessment process, deployment decisions  <input type="checkbox"/> Volunteer competence identification and assessment process, and deployment decisions  <input type="checkbox"/> Staff preparation process including induction and professional development  <input type="checkbox"/> Provider checking process  <input type="checkbox"/> Volunteer preparation process including induction (clear briefing on role and responsibilities)  <input type="checkbox"/> Staff selection and appraisal process  <input type="checkbox"/> Codes of conduct for students, staff, volunteers, contracted providers)  <input type="checkbox"/> Student support process </div>								
<b>Safety and risk management</b> <div style="margin-left: 20px;"> <input type="checkbox"/> Event risk and hazard identification, analysis and management process (eg, SAP, RAMS or other)  <input type="checkbox"/> Transport safety procedures  <input type="checkbox"/> Activity standard operating procedures  <input type="checkbox"/> Parental consent process  <input type="checkbox"/> Health profiles for students, staff, volunteers and contracted providers  <input type="checkbox"/> Supervision plan and decisions including ratios </div>								

- ☐ Event/activity-specific safety equipment
- ☐ Communications system within the school; between the school and the field; in the field
- ☐ Equipment usage/maintenance/storage procedures
- ☐ Swimming competence assessment
- ☐ Aquatic safety procedures
- ☐ Variance process (when can deviate from the stated procedures)
- ☐ Venue/facility safety check

**Emergency response**

- ☐ Emergency procedures, including a Traumatic Incident Response Plan (TIRP)
- ☐ Incident reporting process (eg. National Incident Database)
- ☐ Incident analysis process
- ☐ Procedure for reporting serious harm incidents to relevant statutory bodies (Dept of Labour, Maritime NZ)

**Programme development and review**

- ☐ New programme development process
- ☐ Event review procedure
- ☐ EOTC Management System review cycle and process





Your school's

**EOTC  
LOGO**

**Arthur's Academy**


**Media Wallet Cards 1**

25.1

<p><b>advice for media interviews</b></p> <p>If a journalist calls you direct don't make an off-the-cuff comment. Tell them you will call them back, then take the time to prepare your single over-riding communications objective.</p> <p>This is the one thing you want your audience to remember.</p> <p><i>Keep it simple.</i></p> <p><b>find out</b></p> <ul style="list-style-type: none"> <li>- who is calling</li> <li>- what organization they represent</li> <li>- their phone number</li> <li>- the general nature of their inquiry</li> <li>- who else they have spoken to</li> </ul>	<p><b>advice for media interviews</b></p> <p>If a journalist calls you direct don't make an off-the-cuff comment. Tell them you will call them back, then take the time to prepare your single over-riding communications objective.</p> <p>This is the one thing you want your audience to remember.</p> <p><i>Keep it simple.</i></p> <p><b>find out</b></p> <ul style="list-style-type: none"> <li>- who is calling</li> <li>- what organization they represent</li> <li>- their phone number</li> <li>- the general nature of their inquiry</li> <li>- who else they have spoken to</li> </ul>
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 <p>Your school's</p> <p><b>EOTC LOGO</b></p>	<p align="center"><b>Arthur's Academy</b></p> <p align="center"><b>Media Wallet Cards 2</b></p>		<p align="center"><b>25.2</b></p>
<p><b>Interview checklist</b></p> <p>DO talk only about your area</p> <p>DO distinguish fact from fiction</p> <p>DO answer the question firmly and directly</p> <p>DO keep to the issue and use key messages</p> <p>DO use plain language and avoid slang, jargon, or waffle</p> <p>DON'T make personal comments</p> <p>DON'T criticise other people or organisations</p> <p>DON'T speculate try to answer 'what if' questions</p> <p>DON'T over say no comment if you don't know the answer, say so</p> <p>DON'T look at or into the camera. Talk to the interview, focusing at head level</p>	<p><b>Interview checklist</b></p> <p>DO talk only about your area</p> <p>DO distinguish fact from fiction</p> <p>DO answer the question firmly and directly</p> <p>DO keep to the issue and use key messages</p> <p>DO use plain language and avoid slang, jargon, or waffle</p> <p>DON'T make personal comments</p> <p>DON'T criticise other people or organisations</p> <p>DON'T speculate try to answer 'what if' questions</p> <p>DON'T over say no comment if you don't know the answer, say so</p> <p>DON'T look at or into the camera. Talk to the interview, focusing at head level</p>		
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<p><b>Interview checklist</b></p> <p>DO talk only about your area</p> <p>DO distinguish fact from fiction</p> <p>DO answer the question firmly and directly</p> <p>DO keep to the issue and use key messages</p> <p>DO use plain language and avoid slang, jargon, or waffle</p> <p>DON'T make personal comments</p> <p>DON'T criticise other people or organisations</p> <p>DON'T speculate try to answer 'what if' questions</p> <p>DON'T over say no comment if you don't know the answer, say so</p> <p>DON'T look at or into the camera. Talk to the interview, focusing at head level</p>	<p><b>Interview checklist</b></p> <p>DO talk only about your area</p> <p>DO distinguish fact from fiction</p> <p>DO answer the question firmly and directly</p> <p>DO keep to the issue and use key messages</p> <p>DO use plain language and avoid slang, jargon, or waffle</p> <p>DON'T make personal comments</p> <p>DON'T criticise other people or organisations</p> <p>DON'T speculate try to answer 'what if' questions</p> <p>DON'T over say no comment if you don't know the answer, say so</p> <p>DON'T look at or into the camera. Talk to the interview, focusing at head level</p>		

		<b>Arthur's Academy</b>		<b>26.0</b>
<b>Event Report and Evaluation</b>				
Event:	Catching fish	Location:	Clutha River	
Person in Charge:	Hay, Elizabeth			
Start date:	05/05/2010	End date:	07/05/2010	
<b>Attendance</b>				
No of boys:	_____	No of girls:	_____	
Age range:	14-15			
<b>Staffing numbers</b>				
Teachers:	3	Volunteers:	2	
Student helpers:	15	Nights:	2	
Transport used: 3 student cars and 2 staff cars				
Distance travelled: 57 km each way				
Costs: No extra costs were experienced				
<b>Curriculum Areas</b>	<b>Learning Outcomes</b>	<b>Achieved: Yes/No</b>		
Nature study	Can count butterflies	Yes		
Water study	Can spot frogs	Yes		
Hill study	Can climb hills	Yes		
Trian study	Can spot trains	No		

Item	Rating out of 10	Comment
1. Pre-event organisation	9	Splendid
2. Objectives met	7	Amazing
3. Travel arrangements	6	Stupendous
4. Instruction	5	Inspirational
5. Equipment	6	Wonderful
6. Suitability of venue	7	Excellent
7. Accommodation	8	Far out
8. Food	9	Outstanding
9. Evening activities	8	Unbelievable
10. Other	9	Extraspecial

Signed : \_\_\_\_\_ Date : \_\_\_\_\_

Name : \_\_\_\_\_

 <b>EOTC LOGO</b>	<b>Arthur's Academy</b> <div style="border: 1px solid black; padding: 5px; display: inline-block; background-color: #fff9c4;"> <b>EOTC Leader Log Book</b> </div>	<b>27.0</b>
Name: Hay, Elizabeth      Role: TIC / Support / Volunteer		
Date: _____ Group: _____		
Activity: Catching fish		
Venue: Clutha River		
No of participants: _____		
Other staff involved: _____		
Learning intentions met:    Yes / No      Ratio leaders/participants: 1 : 4		
Weather: _____		
<b>Event/activity/trip plan</b> _____ _____ _____		
<b>Any difference to the plan that occurred and why</b> _____ _____ _____		
<b>Reflective comment</b> _____ _____ _____		
<b>What went well</b> _____		

\_\_\_\_\_

\_\_\_\_\_

**What I learnt**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**What was confirmed for me**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Reflecting on any incidents (injury, illness or near miss)**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**What I would do differently next time**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Hazards identified (Added to RAMS stored on computer: Yes / No)**

\_\_\_\_\_

\_\_\_\_\_


\_\_\_\_\_

**Other**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_



Your school's

**EOTC  
LOGO**

**Arthur's Academy**

**EOTC Equipment Log**

**28.0**

Staff: \_\_\_\_\_ Group: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Date \_\_\_\_\_ Number \_\_\_\_\_


Activity \_\_\_\_\_ Time hr/day \_\_\_\_\_

Venue \_\_\_\_\_ Weather \_\_\_\_\_

Gear	Total	Used	Returned	Comments	Action taken

**Returned gear has been checked, cleaned and put away.**

Signed: \_\_\_\_\_ (Person in charge)

 <b>EOTC LOGO</b>	<b>Arthur's Academy</b> <div style="border: 1px solid black; padding: 5px; display: inline-block; background-color: #fff9c4;"> <b>Injury Report Form</b> </div>	<b>29.0</b>
---	--	-------------

<b>Patient Name:</b> _____	
<b>Age:</b> _____ OR Adult / Staffmember (circle)	<b>Gender:</b> Male / Female (circle)
<b>Date of injury:</b> _____	<b>Time of injury:</b> _____
<b>Time reporting at office:</b> _____	<b>Time student seen:</b> _____

**1. When did the injury/injuries occur?**

<input type="checkbox"/> On the way to school	<input type="checkbox"/> At school, after class time
<input type="checkbox"/> At school, before class time	<input type="checkbox"/> On the way home from school
<input type="checkbox"/> During class time	<input type="checkbox"/> Beyond the school under supervision/EOTC trip
<input type="checkbox"/> Morning/afternoon interval	<input type="checkbox"/> Followup to previous incident/injury
<input type="checkbox"/> Lunchtime	<input type="checkbox"/> Other (specify) _____

**2. Where did the injury/injuries occur?**

<b>Outside the school buildings</b> <input type="checkbox"/> Asphalt/concrete <input type="checkbox"/> Grassed area <input type="checkbox"/> Sports field <input type="checkbox"/> Swimming pool <input type="checkbox"/> Climbing frame <input type="checkbox"/> Adventure playground/Ropes course <input type="checkbox"/> Steps/stairs <input type="checkbox"/> Tree <input type="checkbox"/> From/on building/structure <input type="checkbox"/> Car park <input type="checkbox"/> Other outside area (specify) _____ _____	<b>Inside the school buildings</b> <input type="checkbox"/> Classroom <input type="checkbox"/> Hall/gym <input type="checkbox"/> Steps/stairs <input type="checkbox"/> Other inside area (specify) _____ _____ <b>Beyond the school grounds</b> <input type="checkbox"/> Sports trip <input type="checkbox"/> Class trip <input type="checkbox"/> Camp <input type="checkbox"/> Road/footpath <input type="checkbox"/> Other area (specify) _____ _____
---	---

Specific location: \_\_\_\_\_

**3. What activity was the student engaged in?** (eg playing netball, running to class)

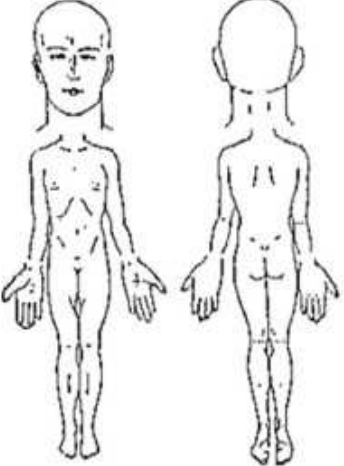
\_\_\_\_\_

**4. How did the injury/injuries occur?** (mention any product or aspect of the environment that was involved eg. struck by softball, slipped on ice)

\_\_\_\_\_

\_\_\_\_\_

**5. What were the injuries or suspected injuries?** Tick the boxes and draw an arrow from the injury to indicate the location of each injury.


<input type="checkbox"/> Fracture		<input type="checkbox"/> Spinal	<input type="checkbox"/>
<input type="checkbox"/> Dislocation		<input type="checkbox"/> Clavicle / neck	<input type="checkbox"/>
<input type="checkbox"/> Strain/sprain		<input type="checkbox"/> Foreign body	<input type="checkbox"/>
<input type="checkbox"/> Concussion		<input type="checkbox"/> Burn	<input type="checkbox"/>
<input type="checkbox"/> Internal injury		<input type="checkbox"/> Poisoning	<input type="checkbox"/>
<input type="checkbox"/> Open wound		<input type="checkbox"/> Nosebleed	<input type="checkbox"/>
<input type="checkbox"/> Puncture wound		<input type="checkbox"/> Sting	<input type="checkbox"/>
<input type="checkbox"/> Graze		<input type="checkbox"/> Crush injury	<input type="checkbox"/>
<input type="checkbox"/> Bruise		<input type="checkbox"/> Other (specify)	<input type="checkbox"/>
<input type="checkbox"/> Head injury		_____	<input type="checkbox"/>
<input type="checkbox"/> Medical			<input type="checkbox"/>

**6. What treatment for the injury/injuries was provided at school?**

<input type="checkbox"/> No treatment	<input type="checkbox"/> Cleaned wound
<input type="checkbox"/> Immobilised limb	<input type="checkbox"/> Applied sling
<input type="checkbox"/> Immobilised injured person	<input type="checkbox"/> Applied splint
<input type="checkbox"/> Applied cold pack	<input type="checkbox"/> Bandaged
<input type="checkbox"/> Applied pressure	<input type="checkbox"/> Poisons Information Centre consulted



<input type="checkbox"/> Applied cold water	<input type="checkbox"/> Doctor consulted
<input type="checkbox"/> RICE	<input type="checkbox"/> Other (specify):
<input type="checkbox"/> Monitored only	_____
<b>7. To which of the following was the student referred?</b>	
<input type="checkbox"/> Parent/caregiver	<input type="checkbox"/> Hospital
<input type="checkbox"/> Hostel	<input type="checkbox"/> Ambulance service
<input type="checkbox"/> Public health nurse	<input type="checkbox"/> No referral
<input type="checkbox"/> Dental nurse/dentist	<input type="checkbox"/> Other (specify):
<input type="checkbox"/> Doctor/medical centre	_____
<b>8. Did the student stay overnight or longer in hospital?</b>	
<input type="checkbox"/> Yes	<input type="checkbox"/> No
If yes, how many days did he/she spend in hospital? _____ days	

 <span style="font-size: 0.8em; vertical-align: middle;">Your school's</span>		<b>Arthur's Academy</b>	29.1
<b>EOTC LOGO</b>		<b>Injury Report Details</b>	
<b>Narrative</b> Describe how the injuries happened		<b>Analysis</b> Include any recommendations, suggestions and/or observations/patterns	
<b>Possible physical contact with patient bodily fluid?</b> <input type="checkbox"/> No <input type="checkbox"/> Yes    ----->		<b>Follow up: Review of incident</b> Comments made or procedural/programme changes recommended	
Type: _____			
<b>Patient Report Form completed:</b> Given to: <input type="checkbox"/> Ambulance <input type="checkbox"/> Doctor <input type="checkbox"/> No <input type="checkbox"/> Yes <input type="checkbox"/> Parent <input type="checkbox"/> Patient			
<b>Time involved in treatment:</b> _____ minutes			
<b>Signature :</b> _____ <b>Name :</b> _____		<b>Follow up to:</b> _____ <b>Date :</b> _____ <b>Name :</b> _____ <b>Signature :</b> _____	

## Outdoor Education/Recreation Incident Report

Notes: Fields marked in red with \* are compulsory fields.

Please ✓ as applicable in fields below.

## 1. General Incident Information

Incident report # (from database) \_\_\_\_\_

Severity rating*: actual* ____ potential* ____ (see severity scale)		Region*: Eg. Southland, Taranaki	
Location of incident* (Name of river, track, rock climb, etc.)			
Grid reference:		Date of incident*:	
		Time* (24 hr, e.g. 2pm = 1400) : .....	
<b>Incident type*</b> <input type="checkbox"/> Injury <input type="checkbox"/> Illness <input type="checkbox"/> Psychological/emotional <input type="checkbox"/> Equipment loss/damage <input type="checkbox"/> Fatality <input type="checkbox"/> Missing/overdue <input type="checkbox"/> Near Miss		<b>Weather at time of incident*</b> Fine <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> Wet Hot <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> Cold Calm <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> Windy  No. of people involved* _____	
		<b>Communications used</b> <input type="checkbox"/> Mountain radio <input type="checkbox"/> Flare <input type="checkbox"/> VHF radio <input type="checkbox"/> Locator beacon <input type="checkbox"/> Mobile phone <input type="checkbox"/> Messenger (person) <input type="checkbox"/> Satellite phone <input type="checkbox"/> n/a <input type="checkbox"/> Avalanche transceiver <input type="checkbox"/> Other _____	
		<b>Is this a lost day case?*</b> <input type="checkbox"/> Yes <input type="checkbox"/> No # days lost _____	

## 2. Information on person/s involved in incident. (Complete for each person. More names? Add to a separate sheet)

First name: _____ Last name: _____ Age*: _____ Gender: M F Ethnicity*: <input type="checkbox"/> NZ <input type="checkbox"/> Maori <input type="checkbox"/> Pacific Is. <input type="checkbox"/> Asian <input type="checkbox"/> Other _____ <input type="checkbox"/> Unknown Evacuation Method*: <input type="checkbox"/> Walked out <input type="checkbox"/> Stretcher <input type="checkbox"/> Vehicle <input type="checkbox"/> Helicopter <input type="checkbox"/> Boat <input type="checkbox"/> n/a <b>Injury type *</b> <input type="checkbox"/> Burn <input type="checkbox"/> Blister <input type="checkbox"/> Bruise <input type="checkbox"/> Concussion <input type="checkbox"/> Eye injury <input type="checkbox"/> Dislocation <input type="checkbox"/> Dental <input type="checkbox"/> Frostbite <input type="checkbox"/> Fracture <input type="checkbox"/> Head injury <input type="checkbox"/> Laceration/cuts <input type="checkbox"/> Muscle strain <input type="checkbox"/> Near drowning <input type="checkbox"/> Punctures <input type="checkbox"/> Skin abrasions <input type="checkbox"/> Sprain <input type="checkbox"/> Sunburn <input type="checkbox"/> Tendonitis <input type="checkbox"/> Psychological <input type="checkbox"/> Other _____	First name: _____ Last name: _____ Age*: _____ Gender: M F Ethnicity*: <input type="checkbox"/> NZ <input type="checkbox"/> Maori <input type="checkbox"/> Pacific Is. <input type="checkbox"/> Asian <input type="checkbox"/> Other _____ <input type="checkbox"/> Unknown Evacuation Method*: <input type="checkbox"/> Walked out <input type="checkbox"/> Stretcher <input type="checkbox"/> Vehicle <input type="checkbox"/> Helicopter <input type="checkbox"/> Boat <input type="checkbox"/> n/a <b>Injury type *</b> <input type="checkbox"/> Burn <input type="checkbox"/> Blister <input type="checkbox"/> Bruise <input type="checkbox"/> Concussion <input type="checkbox"/> Eye injury <input type="checkbox"/> Dislocation <input type="checkbox"/> Dental <input type="checkbox"/> Frostbite <input type="checkbox"/> Fracture <input type="checkbox"/> Head injury <input type="checkbox"/> Laceration/cuts <input type="checkbox"/> Muscle strain <input type="checkbox"/> Near drowning <input type="checkbox"/> Punctures <input type="checkbox"/> Skin abrasions <input type="checkbox"/> Sprain <input type="checkbox"/> Sunburn <input type="checkbox"/> Tendonitis <input type="checkbox"/> Psychological <input type="checkbox"/> Other _____	First name: _____ Last name: _____ Age*: _____ Gender: M F Ethnicity*: <input type="checkbox"/> NZ <input type="checkbox"/> Maori <input type="checkbox"/> Pacific Is. <input type="checkbox"/> Asian <input type="checkbox"/> Other _____ <input type="checkbox"/> Unknown Evacuation Method*: <input type="checkbox"/> Walked out <input type="checkbox"/> Stretcher <input type="checkbox"/> Vehicle <input type="checkbox"/> Helicopter <input type="checkbox"/> Boat <input type="checkbox"/> n/a <b>Injury type *</b> <input type="checkbox"/> Burn <input type="checkbox"/> Blister <input type="checkbox"/> Bruise <input type="checkbox"/> Concussion <input type="checkbox"/> Eye injury <input type="checkbox"/> Dislocation <input type="checkbox"/> Dental <input type="checkbox"/> Frostbite <input type="checkbox"/> Fracture <input type="checkbox"/> Head injury <input type="checkbox"/> Laceration/cuts <input type="checkbox"/> Muscle strain <input type="checkbox"/> Near drowning <input type="checkbox"/> Punctures <input type="checkbox"/> Skin abrasions <input type="checkbox"/> Sprain <input type="checkbox"/> Sunburn <input type="checkbox"/> Tendonitis <input type="checkbox"/> Psychological <input type="checkbox"/> Other _____
---	---	---

## 3. Activity Information

Activity* (Choose the most appropriate activity the person was engaged in at time of incident)			
<input type="checkbox"/> Abseiling <input type="checkbox"/> Bungy Jumping <input type="checkbox"/> Camping <input type="checkbox"/> Canoeing <input type="checkbox"/> Caving <input type="checkbox"/> Community service <input type="checkbox"/> Cooking <input type="checkbox"/> Cycling <input type="checkbox"/> Field trip: (specify) _____ <input type="checkbox"/> Fishing	<input type="checkbox"/> Free time <input type="checkbox"/> Horse riding <input type="checkbox"/> Hunting <input type="checkbox"/> Initiatives <input type="checkbox"/> Kayaking <input type="checkbox"/> Land yachting <input type="checkbox"/> Mountain biking <input type="checkbox"/> Mountaineering <input type="checkbox"/> Multi-sport/adventure racing <input type="checkbox"/> Orienteering/Trailgaining	<input type="checkbox"/> Rafting <input type="checkbox"/> River crossing <input type="checkbox"/> Rock climbing <input type="checkbox"/> Ropes <input type="checkbox"/> Sailing <input type="checkbox"/> Sea kayaking <input type="checkbox"/> Skiing <input type="checkbox"/> Snowboarding <input type="checkbox"/> Snow caving <input type="checkbox"/> Snorkelling	<input type="checkbox"/> Solo <input type="checkbox"/> Surfing <input type="checkbox"/> Swimming <input type="checkbox"/> Tramping <input type="checkbox"/> Transportation <input type="checkbox"/> Tubing <input type="checkbox"/> Windsurfing <input type="checkbox"/> Waterskiing <input type="checkbox"/> Other _____

<b>Activity Duration*</b>  _____ Hours e.g. 3 1/2 days = 84 hours	<b>Number of people involved*</b> _____ Participants e.g. students _____ Volunteer helpers e.g. parent help _____ Qualified instructors _____ Supervisors e.g. teachers, youth leaders	<b>Was this an EOTC incident?</b> YES NO  <b>Curriculum area (schools only)</b> <input type="checkbox"/> English <input type="checkbox"/> Technology <input type="checkbox"/> Languages <input type="checkbox"/> Social Sciences <input type="checkbox"/> Mathematics <input type="checkbox"/> Arts <input type="checkbox"/> Science <input type="checkbox"/> Health & PE
--	--	---

**4. Activity Leader** (Choose leader most in charge of the group that had the incident)

<b>Was there a leader*?</b> YES NO UNKNOWN (If no, or unknown, go to 5.)			
First name:	Last name:	<b>Does the activity leader have relevant activity qualifications*?</b> YES NO UNKNOWN <b>Leader's experience level*:</b> 1 2 3 4 5 6 UNKNOWN (1 = Inexperienced, - 6 = Highly experienced)	
Age*: _____	Gender*: M F		
UNKNOWN	UNKNOWN		

**5. Equipment involved in incident**

Vehicles, property, gear, equipment damaged, equipment lost, etc.

.....

.....

.....

**6. Narrative** (general description of incident - what, where, how)

.....

.....

.....

.....

.....

.....

**7. Causal Factors**

People*	Equipment*	Environment*
<b>Activity Leader/s</b> <input type="checkbox"/> Inadequate physical condition <input type="checkbox"/> Inadequate mental condition <input type="checkbox"/> Inadequate emotional condition <input type="checkbox"/> Inadequate health – hygiene or medical <input type="checkbox"/> Pre-existing condition <input type="checkbox"/> Judgement error <input type="checkbox"/> Inadequate supervision <input type="checkbox"/> Inadequate training/experience <input type="checkbox"/> Failure to follow policies <input type="checkbox"/> Improper motivation <input type="checkbox"/> Other _____ <input type="checkbox"/> n/a	<b>Participants</b> <input type="checkbox"/> Inadequate physical condition <input type="checkbox"/> Inadequate mental condition <input type="checkbox"/> Inadequate emotional condition <input type="checkbox"/> Inadequate health – hygiene or medical <input type="checkbox"/> Pre-existing condition <input type="checkbox"/> Judgement error <input type="checkbox"/> Inadequate supervision <input type="checkbox"/> Inadequate training/experience <input type="checkbox"/> Failure to follow policies <input type="checkbox"/> Improper motivation <input type="checkbox"/> Other _____ <input type="checkbox"/> n/a	<input type="checkbox"/> No equipment <input type="checkbox"/> Wrong equipment <input type="checkbox"/> Faulty equipment <input type="checkbox"/> Inadequate design <input type="checkbox"/> Other _____ <input type="checkbox"/> n/a  <input type="checkbox"/> Adverse weather <input type="checkbox"/> Inadequate visibility/dark <input type="checkbox"/> Terrain <input type="checkbox"/> Water <input type="checkbox"/> Animal/insect/plant <input type="checkbox"/> Other _____ <input type="checkbox"/> n/a

Explain in detail what you think caused the incident. Include any suggestions, observations or recommendations regarding the incident.

.....

.....

.....

.....

.....

.....

Hand form into your organisation's administrator for input to the National Incident Database – Thank you.  
 For further copies go to [www.incidentreport.org.nz](http://www.incidentreport.org.nz)

## Incident Severity Scale

SEVERITY RANKING	IMPACT ON PARTICIPATION	INJURY	ILLNESS	SOCIAL/ PSYCHOLOGICAL DAMAGE	SEVERITY RANKING	EQUIPMENT DAMAGE	ENVIRONMENTAL DAMAGE
1	<b>MINOR/SHORT TERM IMPACT</b> on individual/s that doesn't have large effect on	Splinters, insect bites, stings	Minor irritant	Temporary stress or embarrassment	1	Minor cost	Littering
2		Sunburn, scrapes, bruises, minor cuts	Minor cold, infection, mild allergy	Temporary stress or embarrassment with peers	2	>\$50	Minor damage to environment that will quickly recover
Severity scale 3 & above to be recorded on National Incident Database							
3	participation in activity /programme.	Blisters, minor sprain, minor dislocation Cold/heat stress	Minor asthma, cold, upset stomach, etc	Stressed. Beyond comfort level. Shown up in front of group.	3	>\$100	Scorched campsite, plant damage
4	<b>MEDIUM IMPACT</b> on individual/s that may prevent participation in the activity / programme for a day or two.	Lacerations, frostnip, minor burns, mild concussion mild hypo/ hyperthermia	Mild flu, migraine	Stressed, wants to leave activity, a lot of work to bring back in.	4	>\$500	Burnt shrubs, cut live branches, washed group dishes in stream, etc
5		Sprains & hyper-extensions, minor fracture	Flu, food/hygiene related diarrhoea/ vomiting	Distressed, freezes on activity, requires 'emotional rescue', does not want to participate again.	5	>\$2,000	Walked through sensitive ecological area destroying some plant life, toileting close to water course
Any workplace incidents at grade 6 and above need to be reported to Dept of Labour.							
6	<b>MAJOR IMPACT</b> on individual/s that means they cannot continue with large parts of the activity/ trip/ programme.	Hospital stay < 12 hours fractures, dislocations, frostbite, major burn, concussion, surgery, breathing difficulties moderate hypo/ hyperthermia	Medical treatment required, hospital stay < 12 hours eg., serious asthma attack, serious infection, anaphylactic reaction	Very distressed, leaves activity and requires on site counselling, unwilling to participate in activity ever again.	6	>\$8,000	Destroyed/ killed some example of flora/fauna
7		Hospital stay > 12 hours eg. arterial bleeding, severe hypo/ hyperthermia, loss of consciousness	Hospital stay > 12 hours eg. infection or illness causing loss of consciousness, serious medical emergency	Therapy/ counselling required by professional	7	>\$20,000	Killed, destroyed or polluted small area of environment
8	<b>LIFE CHANGING</b> effect on individual/s or death.	Major injury requiring hospitalisation e.g., Spinal damage, head injury	Major illness requiring hospitalisation e.g., heart attack	Long term counselling/ therapy required after incident	8	>\$50,000	Killed example of protected species
9		Single death	Single death	Post-traumatic stress disorder, changed profession because of incident.	9	>\$250,000	Fire or pollution etc resulting in area of wilderness being destroyed
10		Multiple fatality	Multiple fatality	Suicide because of incident	10	>\$1,000,000	Major fire or pollution causing serious loss of environment or life

Davidson, 2005. Incident Severity Scale. Adapted and expanded from the Accident Frequency Severity Chart (Priest, 1996).





**EOTC  
LOGO**

**Arthur's Academy**

## **First Aid Kit A**

**31.0**

### **List A**

**Source:** Guidance notes on providing first aid equipment, facilities and training to meet the requirements of the Health and Safety in Employment Act 1992 and Regulations 1995.

- A manual giving general guidance on first aid
- 20 individually-wrapped sterile adhesive dressings (assorted sizes), appropriate to the type of work (dressings may be of a detectable type for food handlers)
- 2 sterile eye pads
- 2 individually-wrapped triangular bandages (preferably sterile)
- 6 safety pins
- 6 medium-sized, individually-wrapped sterile un-medicated wound dressings - approximately 12 cm x 12 cm
- 2 large sterile individually-wrapped un-medicated wound dressings - approximately 18 cm x 18 cm
- 1 pair of disposable gloves
- 1 resuscitation mask

***This is a suggested contents list only; equivalent but different items will be considered acceptable. See 9.3 concerning pain relief. Once the employer has completed their assessment of the first aid items required, a need for additional items may be identified; this could include, for example, scissors, adhesive tape, disposable aprons, individually wrapped moist wipes or saline solution. These may be stored in the first aid kit if there is room, but they may be stored separately as long as they are available for use as required.***



**EOTC  
LOGO**

**Arthur's Academy**

## **First Aid Kit B**

**31.1**

### **List B**

**Source:** Ministry of Education, Health and Safety Code of Practice  
13.5 Minimum first aid supplies

- 4 x Triangular bandages
- 9 x Roller bandages (including crepe bandages 50 mm and 75 mm sizes)
- 10 x Sterile dressings (75 mm x 75 mm packets)
- 2 x Adhesive wound dressing strip (100 mm packets)
- 1 x Waterproof adhesive plaster (50 mm wide reels)
- 5 x Sterile, non adhesive pads (100 mm x 100 mm packets)
- 4 x Sterile eye pads
- 1 x Container to pour water over the eye (e.g. plastic squeeze bottle)
- 1 x Receptacle for soiled dressings (e.g. bucket with foot-operated lid)
- 2 x 250 ml antiseptic liquid approved by the Medical Officer of Health
- 1 x Safety pins (card)
- 1 x Scissors - surgical or equivalent stainless steel (pair)
- 1 x Splinter forceps, fine point - stainless steel
- 1 x Accident register and pen or pencil
- 1 x First aid booklet (issued by the Departments of Labour and Health or Red Cross/Order of St. John)
- 1 x A card listing local emergency numbers
- 8 x Disposable gloves - large size or multi fitting (pairs)

***This list is taken from the Factories and Commercial Premises (First Aid) Regulations 1985 (a copy can be found at [www.legislation.govt.nz](http://www.legislation.govt.nz)), and is based on a maximum of 75 employees. Depending on the number of employees, plus students at the school, more or less supplies may be needed. Contact the nearest Department of Labour office for the schedule that covers a range of employees and students from less than 25 to 250 and over.***



**EOTC  
LOGO**

**Arthur's Academy**

## First Aid Kit C

**31.2**

### List C

Suggested mobile first aid kit list (for outdoor environments)

**Source:** Outdoor first Aid Manual (NZ Mountain Safety Council Manual 33)

- 2 Crepe bandages (1 x 10 cm and 1 x 15cm)
- 2 Triangular bandages cloth
- 10-12 band aids
- 1 Dressing strip
- 3 non-adherent sterile dressings - large
- 6 Gauze dressings
- 1 wound dressing size 14
- 1 wound dressing size 15 (or sanitary pad)
- 1 packet of butterfly closures
- 1 roll sticking tape
- 2 saline 30ml
- Betadine for grazes
- 10 alcohol wipes
- 4 gastrolyte sachets for dehydration, diarrhoea, vomiting
- Foil wine bladders for improvised:
  - Spare water bottle
  - Reflectors for signalling
  - Cold compresses for sprains, stings, bites
  - Hot water bottle
  - Small pillow
  - Splint, or splint padding (fill with air or water)
  - Dressing for open chest wound
- 1 lowreading clinical thermometer
- Scissors
- Tweezers
- Safety Pins
- Needle
- Fine strong thread for removing rings
- Disposable gloves
- Disposable CPR face shield
- Note book
- Pencil
- Chemical cooling/warming packs
- Diarrhoea treatment
- 10 Antihistamine tablets
- 1 packet pain relief eg paracetamol





**EOTC  
LOGO**

**Arthur's Academy**

### Event Inventory and Staff Competence Register

**32.0**

Month/ Date/s	Curriculum Area	EOTC Event	Competence Skill/Experience required	Staff member or outside provider with required competence	GAPS	
					Staff	PD required

## ***Appendix Two***

### **Worsfold.csv**

Three Student Management Systems kindly provide the facility to export some of their student data in a format which can be then used by Worsfold Software programs to import that student data.

Kamar, PCSchool and IES provide this facility. (MUSAC does not, as Worsfold Software packages extract data directly from the MUSAC databases)

The link to MUSAC is 'live', meaning that whenever schools extract data from the MUSAQC databases it is the latest available. The worsfold.csv file from Kamar, PCSchool and IES is NOT live. The data is only as good as the last time you carried out the export. To ensure that you regularly have access to the latest data you =should ensure that you visit your SMS package and generate the worsfold.csv export on a reasonably regular basis – at least one each term.

The following is an example of and the structure of the worsfold.csv file.

H,KAMAR,2

S,7376,0132696956,Adams,Adams,Marion,Marion,Marion Elisabeth, Marion Elisabeth,11KN,,Ngarimu,11,F,Other European,Other European,13/06/1993,Mr J & Mrs M Adams,Mrs Margaret Adams,Mr Jeremy Adams,,,354  
1523,madams@xtra.co.nz,195 Pukawai Crescent,Waipukanui,Christchurch,,8094, 195 Pukawai Crescent, Waipukanui,,Christchurch,8094,11ENG-AA;11S13CO-CO;11M12GB-GB;11ART-PE;11FRE-PI;11GEO-MN;RC-MN

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R,7376,90018,3,M,3/08/2009  
 R,7376,90019,3,M,13/05/2009  
 R,7376,90021,3,N,26/05/2009  
 R,7376,90052,3,M,3/11/2009  
 M,11ACC,90022,3  
 M,11ACC,90023,3  
 M,11ACC,90024,2  
 M,11ACC,90026,3  
 M,11ACC,90027,3  
 M,11ACC,90028,2  
 M,11ART,90018,3

There are four different types of records in worsfold.csv

1. H,KAMAR,2

This is the 'header record' which indicates that it is a valid 'Kamar' export – version 2. (N.B. All three SMS systems use the word 'Kamar' in their header record.

2. S,7376,0123456789,Adams,Adams,Marion,Marion,Marion Elisabeth, Marion Elisabeth,11KN,,Ngarimu,11,F,Other European,Other European,13/06/1993,Mr J & Mrs M Adams,Mrs Margaret Adams,Mr Jeremy Adams,,,354 1523,madams@xtra.co.nz,195 Pukawai Crescent,Waipukanui,Christchurch,,8094, 195 Pukawai Crescent, Waipukanui,,Christchurch,8094,11ENG-AA;11S13CO-CO;11M12GB-GB;11ART-PE;11FRE-PI;11GEO-MN;RC-MN

This is the main data record for the student. It consists of the following thirty-five fields, separated by commas (for 'csv' stands for 'comma separated variables')

S

A student record

---

7376	The student's record ID within the school
0123456789	The student's NSID
Adams	Family name (Legal)
Adams	Family name (Preferred)
Marion	First name (Legal)
Marion	First name (Preferred)
Marion Elisabeth	Full first names (Legal)
Marion Elisabeth	Full first names (Preferred)
11KN	Class
	Timetable
Ngarimu	House
11	Year level
F	Gender
Other European	Ethnicity 1
Other European	Ethnicity 2
13/06/1993	Date of birth
Mr J & Mrs M Adams	Caregiver salutation
Mrs Margaret Adams	Caregiver 1
Mr Jeremy Adams	Caregiver 2
	SCG1
	SCG2
354 1523	Home phone
<a href="mailto:madams@xtra.co.nz">madams@xtra.co.nz</a>	Email
195 Pukawai Crescent	Physical Address 1

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	Physical Address 2
Waipukanui	Physical Address Suburb
Christchurch	Physical Address Town
8094	Physical Address postcode
195 Pukawai Crescent	Postal address 1
	Postal address 2
Waipukanui	Postal address suburb
Christchurch	Postal address town
8094	Postal address postcode
11ENG-AA;11S13CO-CO;11M12GB-GB;11ART-PE;11FRE-PI;11GEO-MN;RC-MN	Subject-Teacher combinations separated by ;

### 3. R,7376,90018,3,M,3/08/2009

There may be several of these records for each student, being their standards and results.

R	Result record
7376	Student ID within school
90018	Standard number
3	Level
M	Result
3/08/2009	Date

### 4. M,11ACC,90022,3

At the end of the file, after the students and their standards records there may be a number of M records. These represent the subjects offered and their attached standards

M	Subject record
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11ACC	Option code
90022	Standard taken by students taking this subject
3	Level of the Standard

This brings us to the end of the manual.

Please feel free to contact the author to suggest enhancements to the package and/or the manual.

Contact details :

Phone 03 449 2094

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## INDEX

### 6

64-bit computer ..... 1.6

### A

Access database 1.1..... 1.1  
 Action Plan Goals 2.20..... 2.20  
 Alarms re meetings 10.11..... 10.11  
 Approval in Principle 5.3..... 5.3  
 Attach Students to Events 5.18..... 5.18

### C

Calendar..... 6.6  
 Caregiver details ..... 3.12  
 Classroom Manager..... 2.4  
 Configuration ..... 2.6  
 Configuration..... 2.1  
 Contact details..... 10.2  
 Contractors ..... 4.1  
 Contractors ..... 4.4  
 Conventions..... ix  
 Copyright .....vii

### D

Database - emailing ..... 9.4  
 Designing documents ..... 6.8  
 Document design ..... 6.8  
 Document Logos ..... 2.8  
 Document Previews ..... 2.14  
 Document Printing ..... 6.18  
 Download an update .. 11.10  
 Downloads..... 11.3

### E

Email students ..... 4.5  
 Email your database ..... 9.4

---

---

Emails .....	2.7
Emails sent .....	9.4
Emergency Phone Numbers .....	2.14
End of Year Process .....	9.2
Entry code .....	1.14
\eotc directory .....	1.9
eotc2011.mdb .....	1.1
Event Approval .....	5.6
Event Documents .....	5.19
Event RAMS and SAP .....	5.13
Event Report and Evaluation .....	5.24
Events	
Attach Students to .....	5.18
<u>Events</u> .....	5.1

F
---

fireg.lic .....	1.11
Frequently Asked Questions.....	11.1

G
---

Global permissions .....	9.6
--------------------------	-----

H
---

Hazard Assessment .....	5.13
Hazards register .....	2.19

I
---

IES .....	2.4
Importing Staff .....	4.2
Importing students .....	3.3
Incident severity levels .....	5.27
Incidents .....	5.25
Install an update .....	11.11
Installation Manual .....	11.4
Installation .....	1.2

K
---

Kamar .....	2.4, 2.6
-------------	----------

---



---

**L**

latest Changes .....	11.9
Latest News .....	11.5
Leaders .....	4.1
Levels of Risk	
Attached Documents .....	2.13
Levels of Risk .....	2.11
License.....	vii
Licensing .....	1.15, 1.16

**M**

Manual - downloading .....	11.10
Manual .....	1.2, 1.7
manual .....	1.7
Meeting times .....	2.7
Microsoft .....	1.1
Ministry of Education .....	2.11
Multiple selections .....	ix
MUSAC .....	2.4
MUSAC Staff .....	4.2

**N**

Networking .....	1.3, 1.8, 1.13
------------------	----------------

**O**

Official documents .....	2.9
Organisations .....	4.1, 4.4

**P**

Package Links .....	2.4
Password .....	1.14
PCSchool .....	2.4
Performing Searches .....	8.1
Permissions - global setting of .....	9.6
Photograph Directories .....	2.22
Printing Calendars .....	6.6
Printing Documents .....	6.18
Printing Lists .....	6.6
Printing Utility .....	6.1

---

---

Program files x86 directory .....	1.6
-----------------------------------	-----

R
---

Rams	
Critical Incident Management .....	2.18
Docs and guidelines .....	2.18
RAMS .....	2.15
Registration .....	1.15
Risk Management Plan .....	5.14

S
---

Sample Documents .....	Appendix 1
SAP Entries .....	2.20
Search for students .....	8.1
Send Emails to event people .....	5.29
Senior leader Evaluation .....	5.23
Sent Emails .....	9.4
Shortcut .....	1.0
Spurious examples .....	ix
Staff	
Basic Information .....	4.3
Basic Information .....	4.6
Emergency Details .....	4.7
Staff Qualifications .....	4.9
Staff Skills .....	4.8
Staff .....	4.1
Student Manager .....	2.4
Student Roles .....	5.22
Student Selector .....	3.3
Student Strengths .....	5.20
Students	
Basic Information .....	3.5
Students - finding .....	8.1
Students' Action Plan Goals .....	3.112
Students' Blanket Approvals .....	3.18
Students' Events .....	3.8
Students' General Notes .....	3.17
Students' Medical details .....	3.15
Students .....	3.1
system files .....	1.2

---

**T**

Thanks .....	x
--------------	---

**U**

Unofficial documents .....	2.9
Update students from Kamar .....	3.3
Update students from MUSAC .....	3.3
User Entry Code .....	2.3
User Name .....	2.3
User Password .....	2.4
User rights .....	2.4
Users .....	2.3
Utilities .....	9.1

**W**

Warranty .....	vii
Web site – access from within the package .....	11.6
Web site .....	11.1
Worsfold Software web site .....	11.1
Worsfold.csv .....	2.6
Worsfold.csv App .....	Appendix 2