

# New School Year Setup Guide

For Primaries and Primary Specials  
(schools with only KS2 or below)

Version	Date	Updates
1	24/04/20	-
2	18/07/20	Added more top tips
3	16/04/21	Updated for 2021 and new branding
4	30/06/21	Added guidance for My Classroom
5	07/07/21	Added guidance for Data Collections in Assessments
6	12/08/21	Added a link to bulk enrolment guidance
7	08/04/22	Updated for 2022
8	24/06/22	Updated guidance for various areas

Produced by Arbor Education Partners Ltd.  
for use with Arbor School MIS.

Please check our Help Centre to ensure you  
are using the most up to date manual  
possible.

If your MIS is not behaving as expected and  
you can't find a solution in the Help Centre,  
click **Contact Us** in the top right of the Help  
Centre to get in touch.

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# Preparing for the Setup

Each Summer Term a number of steps must be completed to successfully set up the next Academic Year on Arbor. To make this as simple and hassle-free as possible for you, we have created an easy-to-follow process to ensure you set up everything you need to, and in the right way.

We recommend doing this setup before you break up for the summer holidays. There's no need to wait until later in the summer, as the changes you make won't take effect until the new school year starts in September.

Before you start, gather the information you need using the **New School Year Setup Preparation Checklist**, available on the Help Centre [here](#).

## Do we have to complete all the steps?

Some steps are optional depending on your Arbor package and requirements. If you don't use a certain area (such as if you don't use houses, you can mark the step as **Complete**.

### Houses

**Setup 2022/2023**

1. Copy houses and house enrolments 4 out of 4 houses copied

**Review**

Houses (2022/2023) + Add

**Instructions**

Houses setup steps are optional. Once you have reviewed Houses, click Mark as complete to complete setup or click Skip for now to review later.

✓ Mark as complete

↪ Skip for now

Steps in bold are required for all schools:

- **Enter all your school dates for the year**
- **Off-Roll any Leavers**
- **Promote your current Year Groups and Registration Forms**
- Copy over any Custom Groups you have set up that you may want to use again
- Copy over Houses and House Enrollments into the new academic year
- **Enter the times for your Courses & Classes to create your Timetable**
- Copy over meals, meal sittings and meal choices for students

- Copy over any Interventions you will continue to run
- Set up other things you'll need next year, like Assessments and Behaviour

Finally, review your New School Year Setup. You're now ready for next year!

## Can we come back to a step later?

If you need to come back to a step later to add more information you can! Just click **Skip for now** and put a reminder into your diary to come back to it later. When you come back, click **Resume progress**.

### Houses

Setup 2022/2023
1. Copy houses and house enrolments <span>4 out of 4 houses copied</span>
<b>Review</b>

**Instructions**

Houses setup was marked as skipped on **16 Jun 2022, 16:35**, click the button below to resume progress.

**Resume progress**

## How can I get started?

The area for setting up your new school year can be found by going to **School > School Structure > School Year Setup**. This area of Arbor is locked until the **1st May**.

### School Year Setup

Steps to prepare for the new academic year are locked until the Academic Calendar is [filled in and marked as complete](#).

2021/2022
1. Academic Calendar <span>Incomplete</span>

**Please Note:** For now, only the basic details (start date, end date, name) of the 2021/2022 academic year can be set. The rest of the school year setup (like setting up the academic calendar, holidays, student groups etc.) will be accessible from **01 May 2021**, 4 months prior to the beginning of 2021/2022 academic year.

Once the 1st May has passed, the School Year Setup area will be open.

This Overview page lets you view your progress. You can jump in and out of the New School Year Setup so you don't need to do everything in one sitting! Your current step will be highlighted in red as 'Incomplete'.

Only when certain steps have been completed can the next steps be unlocked.

## School Year Setup

Steps to prepare for the new academic year are locked until the Academic Calendar is [filled in and marked as complete](#).

2021/2022	
1. Academic Calendar	Incomplete
2. Off-Roll Leavers	Locked
3. Year Groups & Registration Forms	Locked
4. Custom Groups	Locked
5. Houses	Locked
6. Courses & Classes	Locked
7. Meals	Locked
8. Interventions	Locked
Review School Year Setup	

### Can we move students up early?

At your school, students might move into next year's subjects, lessons and timetable in June or July in the current academic year for a few weeks before the summer holidays. You should not use the New School Year Setup process to promote students early. Instead, please follow these instructions: [Move students up to start the next academic year early](#)

# Step 1 - Create your Year

Go to **School > School Structure > School Year Setup**. Click on the first step to finalise your Academic Calendar for the next year.

## Add the intake season

If you've already been using Arbor to [manage your applicants](#) for September's cohort, you can skip to the next step.

If you haven't been using Arbor to manage applicants, you'll need to add the next academic year and create an intake season. Do this by following [these instructions](#).

**Create Academic Year**

Academic year name\*

Start date ⓘ 01 Sep 2021

End date ⓘ  

Cancel
Create Academic Year

## Set up the Academic Calendar

Once you have added a year, you will be able to see the rest of the New School Year Setup.

The next step is to set up your academic calendar (or check it has been set up correctly if it has already been created. Click the option for **1. Academic Calendar**.

1. Academic Calendar		Incomplete
2. Off-Roll Leavers	1. Academic Calendar	Locked
3. Year Groups & Registration Forms	Academic Calendar setup is incomplete, click to resolve	Locked
4. Custom Groups		Locked
5. Houses		Locked
6. Courses & Classes		Locked
7. Meals		Locked
8. Interventions		Locked
Review School Year Setup		

You can then complete the setup of your Academic calendar. This includes three sections to work on:

1. creating the academic year
2. setting up terms
3. setting up holidays

**Make sure the academic year dates also cover the summer holidays, which are considered part of the academic year.**

### Academic Calendar

Academic Year 2021/2022	
Academic year name	2021/2022 ▶
Dates	01 Sep 2021 - 31 Aug 2022 ▶
Terms (2021/2022) <span style="float: right;">+ Add</span>	
No terms have been added for 2021/2022	
Holidays (2021/2022) <span style="float: right;">+ Add</span>	
Caution: No holidays have been added for 2021/2022	

**Days Unaccounted For**

Below is a list of days in the Academic Calendar which are currently unaccounted for.

Add Terms and Holidays to ensure all days are accounted for. Once this is done, you'll be able to review and mark the Academic Calendar as complete.

01 Sep 2021 - 31 Aug 2022

In the Terms section, add all the dates you are scheduled to run courses and classes for. Click **+Add** to add a new term.



**Top Tip: term dates should span the full term.** Do not set up 6 half terms, because this will cause an error message when you try to add half-term holidays. Half Term holiday can be added within the Holidays section instead, shown below.

### Add Term

Academic Year 2021/2022

Term Name\*

Short Term Name\*

Start Date\*

End Date\*

Cancel
Add Term

Once you have added all your term dates, the left-hand side of the screen will highlight any gaps in data.

### Academic Calendar

Academic Year 2021/2022	
Academic year name	2021/2022
Dates	01 Sep 2021 - 31 Aug 2022

Terms (2021/2022)		+ Add
Autumn	06 Sep 2021 - 17 Dec 2021	
Spring	04 Jan 2022 - 01 Apr 2022	
Summer	19 Apr 2022 - 27 Jul 2022	

Holidays (2021/2022)		+ Add
Caution: No holidays have been added for 2021/2022		

### Days Unaccounted For

Below is a list of days in the Academic Calendar which are currently unaccounted for. Add Terms and Holidays to ensure all days are accounted for. Once this is done, you'll be able to review and mark the Academic Calendar as complete.

- 01 Sep 2021 - 03 Sep 2021
- 20 Dec 2021 - 24 Dec 2021
- 27 Dec 2021 - 31 Dec 2021
- 03 Jan 2022
- 04 Apr 2022 - 08 Apr 2022

You can fill these gaps by adding in all your holidays (Half terms, Christmas and Easter break etc) in the **Holiday** section. **Ensure you include all of your holiday dates to ensure there are no attendance registers created on these dates.**

Add in all your half terms, vacation dates and public holidays. Holidays to be set up in the UK include Christmas, Easter, and summer breaks, mid-term holidays, any inset or training days, any public holidays or religious days.



**Top Tip: You do not have to include weekends.**

Click **+Add** to add a new holiday.

### Add Academic Holiday

Holiday name	<input type="text" value="Early May Bank Holiday"/>
Holiday type*	<input type="text" value="Public Holiday"/> <span style="float: right;">+ ▼</span>
Start date* <small>📅</small>	<input type="text" value="2nd May 2022"/> <span style="float: right;">📅</span>
End date* <small>📅</small>	<input type="text" value="2nd May 2022"/> <span style="float: right;">📅</span>

You should only use the Holiday Type of **Half-Term** for the actual half-term breaks (October, February and May). This is to ensure you can use the **Half-Termly assessment period** for assessments, among other things.

### Add Academic Holiday

**Holiday name**

**Holiday type\*** Half-Term ✕ ▼

**Start date\***  📅

**End date\***  📅

Cancel
Add Academic Holiday

If you have a remaining gap at the start of the academic year (due to starting the calendar as advised on 1st September), you can fill this with a holiday type of Vacation, as it is the final part of the summer vacation.

Dates	01 Sep 2021 - 31 Aug 2022	▶
<b>Terms (2021/2022)</b> <span style="float: right;">+ Add</span>		
Autumn	06 Sep 2021 - 17 Dec 2021	▶
Spring	04 Jan 2022 - 01 Apr 2022	▶
Summer	19 Apr 2022 - 27 Jul 2022	▶
<b>Holidays (2021/2022)</b> <span style="float: right;">+ Add</span>		

Add Terms and Holidays to ensure all days are accounted for. Once this is done, you'll be able to review and mark the Academic Calendar as complete.

01 Sep 2021 - 03 Sep 2021

Now I have added all my relevant holidays, training days etc, I can see there are now no gaps in the dates, and all dates have been accounted for.

**Don't worry if you haven't yet added in your inset days - you can return to this step at a later date once you know when these will be.**

For now, click **Mark Academic Calendar as Complete**.

## Academic Calendar

Academic Year 2021/2022		
Academic year name	2021/2022	▶
Dates	01 Sep 2021 - 31 Aug 2022	▶
Terms (2021/2022) <span style="float: right;">+ Add</span>		
Autumn	06 Sep 2021 - 17 Dec 2021	▶
Spring	04 Jan 2022 - 01 Apr 2022	▶
Summer	19 Apr 2022 - 27 Jul 2022	▶
Holidays (2021/2022) <span style="float: right;">+ Add</span>		
Summer	01 Sep 2021 - 03 Sep 2021	Vacation ▶
Autumn half term	25 Oct 2021 - 29 Oct 2021	Half-Term ▶
Christmas	20 Dec 2021 - 03 Jan 2022	Vacation ▶
Spring half term	21 Feb 2022 - 25 Feb 2022	Half-Term ▶
Easter	04 Apr 2022 - 18 Apr 2022	Vacation ▶
Early May Bank Holiday	02 May 2022	Public Holiday ▶
Summer half term	30 May 2022 - 03 Jun 2022	Half-Term ▶
Summer	28 Jul 2022 - 31 Aug 2022	Vacation ▶

**Days Unaccounted For**

All days have been accounted for.

Mark Calendar as Complete



**Top Tip: To make any further changes to the academic calendar you must click the red Return to incomplete button, then make your edits.**

Download Term Card

Download Student List

Academic Calendar setup was marked as complete on **16 Apr 2021, 11:37.**

Click below return Academic Calendar to incomplete and make changes.

Return to incomplete

You must then again click the **Mark calendar as Complete** button to save your changes and enable you to continue editing the next sections.

Mark Calendar as Complete

## Check you've set up your calendar correctly

Go to **School > School Structure > School Year Setup > 1. Academic Calendar**. In the example below, you can see that the Autumn term is set to end on the 17th December, but because the Christmas break holiday is set to start on the 17th December, this overrides the term dates. There will be no registers on the 17th of December.

Terms (2021/2022)		+ Add
Autumn	06 Sep 2021 - 17 Dec 2021	▶
Spring	04 Jan 2022 - 01 Apr 2022	▶
Summer	19 Apr 2022 - 27 Jul 2022	▶

Holidays (2021/2022)		+ Add
Summer	01 Sep 2021 - 03 Sep 2021	Vacation ▶
Autumn half term	25 Oct 2021 - 29 Oct 2021	Half-Term ▶
Christmas	17 Dec 2021 - 03 Jan 2022	Vacation ▶

To fix this, make sure that your vacations do not overlap with your term dates.

To do this, click on the date you would like to amend. In the example, I need to change the start date for Christmas Break to reflect the first date there should be no registers for. The holiday should be scheduled to start on the 20th (Arbor automatically discounts weekends).

### Edit Academic Holiday

**Holiday name**

**Holiday type\***  ✕ ▼

**Start date\***  📅

**End date\***  📅

Delete

Cancel

Save Changes

# Step 2 - Off-Roll Leavers

When you return to the New School Year Overview, you can see that the **Academic Calendar** section has been marked as **Complete** and other sections have now become available. The next step is to choose when your cohort of leaving students will be unenrolled.

1. Academic Calendar	Complete
2. Off-Roll Leavers	Available
3. Year Groups & Register	Available
4. Custom Groups	Available
5. Houses	Locked
6. Courses & Classes	Locked
7. Meals	Locked
8. Interventions	Available

2. Off-Roll Leavers

Off-Roll Leavers setup is available and needs to be marked as complete

The ability to Off-Roll Leavers helps save you time as you don't need to end students who are moving on individually via their Student Profile.

On this page, you'll also see in the Review section any students who have already left or have been given an end date within the current summer term, for example, if a year 3 student emigrated halfway through the year.

## Off-Roll Leavers

### Off-Roll 2020/2021 Leavers

1. Off-Roll Leavers [Click here to off-roll leavers. You can review already off-rolled leavers below.](#)

---

### Review 2020/2021 Leavers

This table shows students who left the school in the last term of 2020/2021.

Showing 1 result [Download](#)

<input type="checkbox"/>	Student	Year	Leaving Date	Reason	Destination
<input type="checkbox"/>	Anderson Nicole	Year 3	14 May 2021	Emigration	

To Off-roll your leavers, click the **Off-Roll Leavers** field.

In the slide over, choose which year group to off-Roll leavers from (likely your Year 6). Click Year 6 - this will bring up a list of all students in Year 6 (the list does not contain students who have already been marked as leavers). In this example, I have selected all my old year 6 students.

[« Back](#) **Off-Roll 2020/2021 Leavers**

**2020/2021 Year Groups**

Please select the year group you wish to off-roll leavers for.

N2	▶
Reception	▶
Year 1	▶
Year 2	▶
Year 3	▶
Year 4	▶
Year 5	▶
Year 6	▶

You should confirm which students you would like to select, their leaving date and their destination. **If you're not sure which leaving date or reason to put, please contact the DfE.**



**Top Tip: This leaving information will be included in all students that have been selected. To add different leaving dates or reasons, unselect certain students and repeat the process, selecting only them.**

Wright Helena

**Leaving Details**

Leaving Date\*  

Leaving Reason\*  ▼

[Cancel](#) [Process Leavers](#)

You can Off-Roll any other students in the same way. Just select the year group they are part of and untick every other student in that year group.

« Back

### Off-Roll Year 5 (2020/2021) Leavers

Tick the students you wish to off-roll and enter the leaving date and the reason for leaving. Please note that the list does not contain students who have already been marked as leavers.

#### Year 5 (2020/2021) Students

Anderson Julie

Anderson Scarlett

If you have any students who are moving to one of your linked schools, tick the box next to their name and click the blue pencil icon to select **Set destination School**.

#### Review 2020/2021 Leavers

This table shows students who left the school in the last term of 2020/2021.

Showing 3 results Download ▼

	Student	Year	Leaving Date	Reason	Destination
<input type="checkbox"/>	<span style="color: blue;">✎</span> Set Destination School	Year 3	14 May 2021	Emigration	
<input type="checkbox"/>	Anderson Scarlett	Year 5	05 May 2021	Permanent exclusion	
<input checked="" type="checkbox"/>	Wright Helena	Year 6	27 Jul 2021	End of phase transfer - Maintaine...	

Don't see the destination school you're looking for? You can add it to your [Linked Organisations](#).

**Wright Helena** Leaving Date: 27 Jul 2021

**Destination School\*** ✎ Arbor Example School (W10 5BN) ▼

**Destination School Details** ✎ **Arbor Example School**

**Address:** 320 Canalot Studios, 222 Kensal Road, London, W10 5BN

**Email:** examplearbor@arbor-mail.com

**Telephone:** None recorded

**Expected Entry Date\*** 📅 1st Sep 2021

Cancel
Set Destination School

## Generating CTFs for your leavers

Once you've set destination schools, you can generate a CTF with your Leaver's information by scrolling down to the bottom of the page and clicking.

Leaver Destinations		
Arbor Example School (27 Jul 2021)	1 student	<a href="#">Create CTF for these students ▶</a>

### New Full CTF Export (step 1 of 2)

CTF Details	
Destination*	<input type="text" value="School in England Or Wales"/>

### CTF New Custom CTF Export (step 2 of 2)

CTF Details	
CTF Type	Full CTF file
Destination LA ⓘ	<input type="text"/>
School* ⓘ	<input type="text"/>
Notes (output in CTF) ⓘ	<input type="text"/>
Student	Philip Adams



**Top Tip: Don't see the school name in the School field above? Click Back then select Unknown Destination in England or Wales to generate a CTF that can be imported into any school!**

You can edit any of the student’s information by clicking on their name in the table and clicking Edit in the slide over. You can then amend the information if incorrect, or add a new enrolment if a student has returned to school after a period of absence.

**Leaving Reason**  ✕ ▼

**Grounds for Removal**  ▼

**Note**

Cancel
Delete
Create New Enrolment
Save Changes

When the CTF is ready to download you’ll get a notification in the top right of your Arbor site. Click the notification.

**Don’t see the notification? Click the refresh button in your browser.**

Arbor Admin [Sign out](#)

0

**Notifications**



**CTF Generated: Allendale Primary School,** 1 minute ago

**Northumberland**

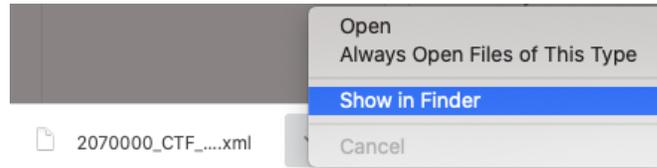
5 students

In the slide over, click the download button.

Type	Full CTF file
Sender	Local Authority: 207, Estab No: 0000
Destination	St Anne's Catholic Primary School, Birmingham (330/3335)
File name	2070000_CTF_3303335_001.xml
Exported on	16 Apr 2021, 12:08
Exported by	Arbor Admin
Students	Helena Wright

Delete
Cancel
Download

The CTF will then download to your computer into your default downloads file. You can then send the file to the destination outside of Arbor following your school's policy.



## Mark the step as complete

When you are happy that this section is now complete, click the green **Mark as Complete** button. You can do this for all the subsequent sections.



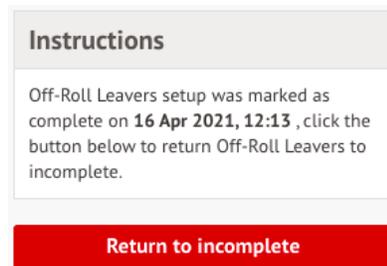
The Off-Roll Leavers section of the School Year Setup will then display as **Complete**.

### School Year Setup

2021/2022	
1. Academic Calendar	Complete
2. Off-Roll Leavers	Complete
3. Year Groups & Registration Forms	Available

If you wish to return to this step and make any changes, click the red **Return to incomplete** button.

When finished, you must then again click the **Mark as Complete** button.



# Step 3 - Year Groups & Registration Forms

The next step is to set up your Year Groups and Registration forms for next year. You **must** complete this step.

**Please note that your promotions will apply based on what is chosen here, and will not be updated if you move students between registration forms. For example, if you promote 7A into 8A, then move a student into 7B, they'll still be promoted into 8A.**

Once you complete this step, Primary Guardians of your applicants will be able to log in to Parent Portal (if you have this module) to see and update details of their child once you send out their welcome email.

## Year Groups & Registration Forms

Setup 2021/2022	
1. Copy year groups and registration forms	Incomplete ▶
2. Assign tutors to year groups and registration forms	Copy or add year groups and registration forms to assign tutors
3. Promote Year Group Students	No Year Groups exist for 2021/2022.
4. Enrol Applicants	There are no applicants for the new school year ▶
5. Review and tweak Year Group enrolments	Optional ▶
6. Promote Registration Form Students	No Registration Forms exist for 2021/2022.
7. Review and tweak registration form enrolments	Optional ▶

Review	
Year Groups (2021/2022)	<a href="#">+ Add</a>
<i>No Year Groups exist for 2021/2022</i>	
Registration Forms (2021/2022)	<a href="#">+ Add</a>
<i>No Registration Forms exist for 2021/2022</i>	

## Copy year groups and registration forms

First, choose which year groups and registration forms to copy over to next year by clicking in the first field.

1. Copy year groups and registration forms Incomplete



**Top Tip: Don't worry if your registration forms will have different names next year.**

Just copy over the number of forms you will need, then change the names later - you can see how to do this here: [Change registration form and register name](#)

Untick any year groups and registration forms you don't want to copy over, then click **Copy Year Groups**. If you untick a year group but leave a registration form for the year group ticked, the registration form will still be copied, but it will not be linked to a year group.

### Copy Year Groups and Registration Forms

Registration forms  Form REAZ  
 Form REGT

**Year 1**

Year group  Year 1

Registration forms  Form 1MJ  
 Form 1TP

**Year 2**

Year group  Year 2

## Editing or adding year groups or registration forms

Click on a registration form to change or add teachers as Form Tutors.

**Please note: If you do this after you've already completed Step 6 of New School Year Setup, you'll need to also add the tutor to the registers using these instructions: [Change teachers](#)**

Registration Forms (2021/2022)			+ Add
Form 1MJ	Tutor: Maureen Jacobs		19 students ▶
Form 1TP	Tutor: Terence Phillips		34 students ▶
Form 2LH	Tutors: None assigned		26 students ▶

You can also link multiple year groups to a registration form, for example, if you register all your nursery students together. Just click into the form and add all the year groups to link it to.

Nursery (2021/2022)
Enrolment

Form Tutor

**Registration Form Details**

Full name Nursery

Short name Nursery

Academic year 2021/2022

Year groups N2 (2021/2022) and N1 (2021/2022)

### Set Year Groups

Year groups

Cancel
Save Changes

Click on a year group to add a Head of Year.

Year Groups (2021/2022)			+ Add
N1	Heads of Year: None assigned		0 students ▶

You can add additional Year Groups or Registration forms if needed by clicking **+Add**. You can also do this from **Students > Enrolment**.

## Year Groups: 2021/2022

Academic Year: 2021/2022 ▼

Listing
Enrolments

**Year Groups for 2021/2022** + Add

N2 Heads of Year: None assigned Year Group

### Add New Year Group to 2021/2022

Academic Year 2021/2022

Year Group Name\*

Short Name

Curriculum Grade\*  ▼

Target Enrolment  ▲ ▼

Cancel
Save Changes

## Assign tutors to year groups and registration forms

Click the **Assign Tutors** field to add this information.

### Year Groups & Registration Forms

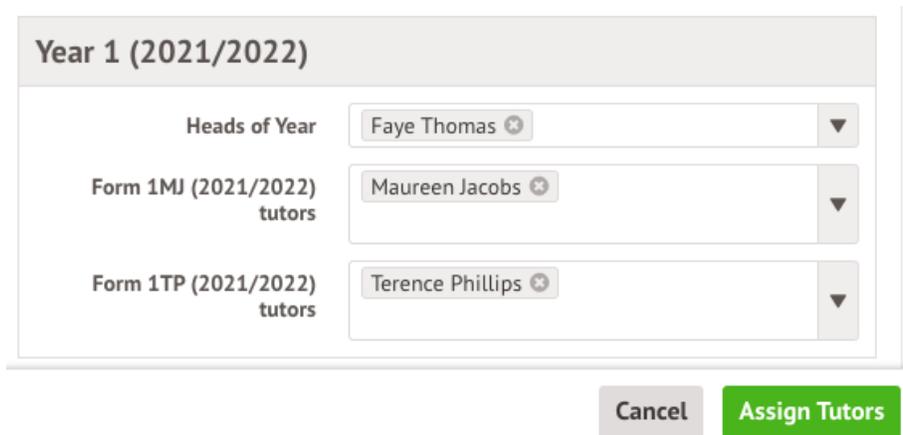
Setup 2021/2022	
1. Copy year groups and registration forms	15 out of 15 year groups copied, 28 out of 28 registration forms copied
2. Assign tutors to year groups and registration forms	Incomplete <span style="float: right;">▶</span>
3. Promote Year Group Students	0 out of 15 promoted <span style="float: right;">▶</span>

Choose the staff members you would like to assign as heads of year and registration forms. Arbor will pre-fill these fields based on your setup this year.

You can amend them if you wish by clicking the X button next to a name and adding a new name from the list (if you already have a [staff profile set up](#) for them).

When you have chosen your tutors, click the green **Assign Tutors** button.

**If you know there will be staffing changes but don't know who will be teaching each class**, you can assign the staff you know will be registration tutors and leave the forms with no tutor yet confirmed blank. You'll need to assign the tutors from the class page when you do know, [click here](#) to see how.



Year 1 (2021/2022)	
Heads of Year	Faye Thomas ✕ ▼
Form 1MJ (2021/2022) tutors	Maureen Jacobs ✕ ▼
Form 1TP (2021/2022) tutors	Terence Phillips ✕ ▼

Cancel Assign Tutors

If you've left a registration form with no tutor, you'll see a message telling you that some year groups and forms do not have tutors assigned.

Make a note that this will need to be entered when you do have the information. [Click here](#) to see how.

2. Assign tutors to year groups and registration forms **8 out of 8 year group tutors assigned, 14 out of 15 registration form tutors assigned** ▶

## Promote year group students

The next step is to Promote Year group Students by clicking this next field.

### Year Groups & Registration Forms

Setup 2021/2022	
1. Copy year groups and registration forms	15 out of 15 year groups copied, 28 out of 28 registration forms copied
2. Assign tutors to year groups and registration forms	12 out of 15 year group tutors assigned, 25 out of 28 registration form tutors assigned ▶
3. Promote Year Group Students	0 out of 15 promoted ▶
4. Enrol Applicants	There are no applicants for the new school year ▶

Choose which year groups to promote students into. For example, below you can see all Year 5 students will be moved into Year 6.

- If only some students are moving up (such as for nursery), promote the whole year. You can then move the students who are remaining in nursery back in the ‘tweak’ step later.
- If you’ll be splitting classes, promote the whole year. You can then move the students who will be in a different class in the ‘tweak’ step later.

You can also see that your highest year group is not automatically promoted. You can leave that field blank, then click **Promote**. When promoting your year groups in Arbor, you will always be at least one short.

Year 4 (2020/2021)	Year 5 (2021/2022) <span>✕</span> ▼
Year 5 (2020/2021)	Year 6 (2021/2022) <span>✕</span> ▼

## Enrol Applicants

In this step, you'll be able to enrol your Applicants into Registration Forms and year groups, as you've now set them up.

If you haven't yet added your applicants to Arbor and finished processing them, you won't be able to enrol them yet. When you click the **4. Enrol Applicants** option, you'll see the below message.

You can use one of our 3 easy methods (shown in [this article](#)) to add these students to your site, then make and accept offers for the applicants who you expect to start in September - take a look at [this article](#) for the process.

### Enrol Applicants

You have 1 unprocessed application for which the applicants cannot yet be enrolled. To manage your applications please click 'Manage Applications' below. Note! Enrol applicants setup as part of School Year Setup will remain with a red 'Incomplete' status, until all unprocessed applications have been dealt with.

Cancel
Manage Applications »

Once you've completed steps 2-5 in the article linked above, you'll be able to enrol your Applicants to be in the correct year groups and registration forms.

In **All Students > Applicants > Select intake season > Applicants**, make sure all the students you want to enrol have the Status of **Offer Accepted**. Tick the students who have accepted their offers.

1. Click the blue pencil icon to assign them to a year group.
2. Repeat, and assign them to a registration form.

When you assign applicants to a registration form, this will automatically also assign them to a year group, and potentially override a year group already input. If the registration form is linked to multiple year groups, it will choose the one that was set up first.

<input type="checkbox"/>		Student	
<input type="checkbox"/>		Make offers	
<input type="checkbox"/>		Accept offers	1
<input type="checkbox"/>		Reject applications	
<input type="checkbox"/>		Withdraw students	
<input type="checkbox"/>		Transfer Intake Season	
<input type="checkbox"/>		Assign applicants to intake bucket	
<input type="checkbox"/>		Assign applicants to intake group	
<input type="checkbox"/>		Assign applicants to year group	2
<input type="checkbox"/>		Assign applicants to registration form	3
<input type="checkbox"/>		Assign applicants to house	
<input type="checkbox"/>		Enrol students	4
<input type="checkbox"/>		Email guardians	

**We recommend checking that students have been assigned to the right year group before enrolling them. If they are not, you can repeat the Assign applicants to year group option to re-add them to the right year group.**

3. Finally click **Enrol students**. The students will then be enrolled in the Applicants section.

<input type="checkbox"/>	Student	Status
<input type="checkbox"/>	Allery Lazar	Enrolled
<input type="checkbox"/>	Badsey Brandon	Enrolled

In the New School Year Setup the **4. Enrol Applicants** section should also now be marked as complete.

If any remaining applicants have accepted a place but haven't yet been enrolled, click the **4. Enrol Applicants** option within Step 2 of the New School Year Setup to enrol these applicants.

**Please note that this will not automatically enrol them into a Year Group and Registration form. If you haven't done this for these students, you should first follow the instructions shown above.**

Applicants  Parveen Chauhan (year group TBC, registration form TBC)

Cancel
Enrol Applicants

### We enrolled applicants before adding a year group or reg form

If you have accidentally enrolled students before you have added them to a year group or registration form, you can undo the enrolment then add them to a Year group, Registration form or House. You can see how to do this [here](#).

### When should we enrol applicants?

You'll be able to make changes to your applicants after you've added them, plus it's easy to remove enrolments for students who don't take up their place. Follow the

instructions in [this article](#) to stop them from appearing in registers, communications and reports. You can see more information here: [Do we have to enrol our applicants now?](#)

## Students are in the wrong year group or reg form

If you have accidentally enrolled students in the wrong groups or need to move them around, you can see how to do this [here](#).

## Review and tweak year group enrolments

The next step is to make any changes to the year group a student has been automatically promoted to if necessary. It is an optional step.

5. Review and tweak Year Group enrolments	Optional	▶
6. Promote Registration Form Students	0 out of 25 promoted	▶
7. Review and tweak registration form enrolments	Optional	▶

Click a student's name to edit the enrolment. Click the Back button to return to the **Year Groups & Registration Forms** page.

**Remember: You can only edit a student's future enrolment from this page. If you need to change their current enrolment, use the Enrolment section on the Student Profile.**

Review Year Groups - 2021/2022	
Please note that you can only edit these enrolments if they are future enrolments or if the student does not yet have an enrolment. To edit a student's current enrolment please use the individual student's enrolment page.	
Student	Year Group
Adams Abbie	Year 4 (2021/2022)
Adams Dean	Year 5 (2021/2022)
Adams Jade	<a href="#">Year 4 (2021/2022)</a>
Adams Justine	N2 (2021/2022)
Allen Callum	Reception (2021/2022)
Allen Graham	Year 1 (2021/2022)
Allen Leah	Year 2 (2021/2022)
Allen Leo	Year 3 (2021/2022)
Allen Max	Year 4 (2021/2022)

## Promote registration form students

You can promote Registration Form students from this year's registration forms into their forms for next year. Don't worry if you at this point are not sure which students belong in which new registration forms - you move students around later.

6. Promote Registration Form Students	0 out of 25 promoted	▶
7. Review and tweak registration form enrolments	Optional	▶

A slide-over will appear listing all registration forms alongside Arbor's suggestions for the year group they will be promoted to. Each current class will have a drop-down menu for you to select which class they will become the following academic year.

**We recommend you promote each Registration Form to the form that the majority of students will be in next year. It's easy to move individual students to different classes, if required, in the Review and tweak step.**

**Year 1 (2020/2021) to Year 2 (2021/2022)**

**Note!**  
It appears there are more registration forms in Year 2 (2021/2022) than there were in Year 1 (2020/2021). This, of course, makes it hard to promote the students into the exact right forms. But don't worry! Just enrol the students into any registration form - you will be able to move them around in a later review step.

Form 1MJ (2020/2021)

Form 1TP (2020/2021)

Form 2GA (2021/2022)  
 Form 2QH (2021/2022)  
 Form 2VG (2021/2022)

**Registration Forms with multiple Year Groups**

Nursery

## Review and tweak registration form enrolments

The last step is to make any changes to the registration forms a student has been automatically promoted to if necessary. It is an optional step.

6. Promote Registration Form Students	23 out of 25 promoted	▶
7. Review and tweak registration form enrolments	Optional	▶

Click on the cell and a page will load for the first year group in your school. Select the year group you wish to make changes to by clicking on the top right-hand corner and selecting the year group from the drop-down.

Click on the cell containing the class information. A drop-down will appear offering the choices of classes for their year group. Select the class you wish to move them to.

**Please note: You can only move students to registration forms in the same year from here. To move a student to a reg form in a different year, they'll need to be added to the year group.**

« Back

### Review Registration Forms

Year Group Year 1 (2021/2022) ▼

**Review Registration Forms - Year 1 (2021/2022)**

Please note that you can only edit these enrolments if they are future enrolments or if the student does not yet have an enrolment. To edit a student's current enrolment please use the individual student's enrolment page.

Student ▲	Registration Form
Allery Lazar	Form 1TP (2021/2022)
Badsey Brandon	Form 1TP (2021/2022)
Benjafield Vi	Form 1MJ (2021/2022)
Benwell Engracia	Form 1TP (2021/2022)

## Resolving students without an enrolment

If you have any students who were not assigned a year group this academic year, they will not have been promoted to the next year group during **Step 2**. Instead, these students will appear in the **Review** section.

**Review**

**Students without an Enrolment for 2021/2022** ▲

Showing 57 results Download ▼

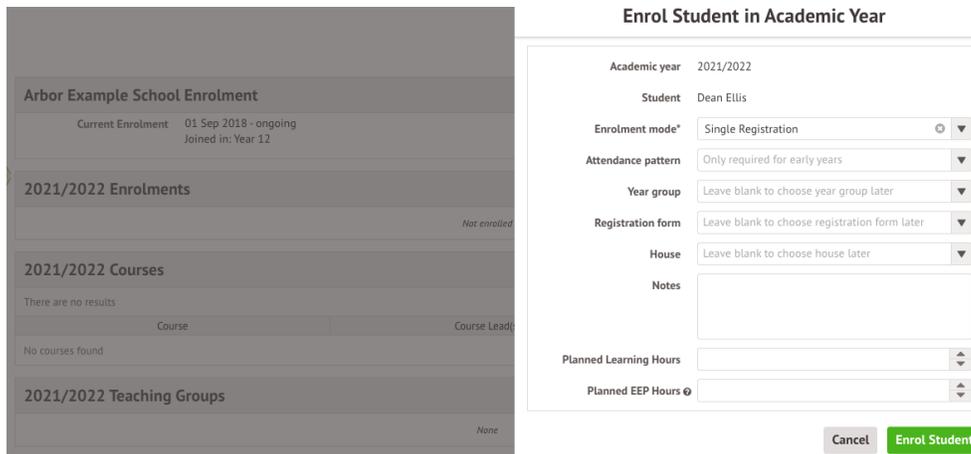
Student ▲	Current Year Group	Current Registration Form
Ellis Dean		

## Enrolling attending students

If they will be attending your school next year, you will need to add them to a year group and registration form. Click the student's name to visit their profile and assign them to a year group and registration form.

First, change the academic year to next year.

In the 2020/2021 Enrolments section, click **+Add** to add their enrolment into the required year group etc.



The screenshot shows a sidebar on the left with sections for 'Arbor Example School Enrolment', '2021/2022 Enrolments', '2021/2022 Courses', and '2021/2022 Teaching Groups'. The main area displays the 'Enrol Student in Academic Year' form for student 'Dean Ellis' in the '2021/2022' academic year. The form includes dropdown menus for 'Enrolment mode\*' (Single Registration), 'Attendance pattern' (Only required for early years), 'Year group', 'Registration form', and 'House'. It also has a 'Notes' text area and 'Planned Learning Hours' and 'Planned EEP Hours' input fields. At the bottom right, there are 'Cancel' and 'Enrol Student' buttons.

## Removing students who will not be attending

To off-roll leavers if they will not be attending your school next academic year, you will need to delete or end their enrollment. Click the student's name to visit their profile.

Click their enrolment in your school.



The screenshot shows a card titled 'Arbor Example School Enrolment'. It contains the text 'Current Enrolment 01 Sep 2018 - ongoing' and 'Joined in: Year 12'. There is a blue arrow pointing to the right on the right side of the card.

In the slide over, click the orange **Edit** button. You can then:

- Unenrol the student if they no longer attend by clicking **Unenrol Student**.
- Delete their enrolment completely by clicking **Delete** if the student never attended your school

Student: Dean Ellis

Entry Date\*:  

Note:

Whichever method you choose to resolve your missed enrolments, the student should no longer appear in the **Review** section of your **New School Year Setup Step 3** page. You should aim to remove all the students listed in this section.

**If you choose to delete the student’s enrollment, if you added the student as an applicant, they will still be marked as Enrolled in the Applicants section.**

<input type="checkbox"/>	Student	Status
<input type="checkbox"/>	Allery Lazar	Enrolled
<input type="checkbox"/>	Badsey Brandon	Enrolled



**Top Tip:** If you want to then delete the student from your system before the [data retention period](#) expires, take a look at [this article](#).

## Make sure your students will be in the right year

To check that all your students have the correct year group for next year, go to **Students > Enrolment**. You will be taken to the **Year Groups** page. Change the academic year using the drop-down menu.

If you have not yet properly completed the setup for the next academic year, you will not see any year groups here. Complete the section above to promote your students into their year groups for next year.

## Year Groups: 2021/2022

Academic Year: 2021/2022 ▼

**Listing**   **Enrolments**

**Year Groups for 2021/2022** + Add

*No Year Groups for 2021/2022*

If you completed this step, you can check your enrolments are correct. You can click on the **Enrolments** tab to directly edit student enrolments.

## Year Groups: 2021/2022

Academic Year: 2021/2022 ▼

**Listing**   **Enrolments**

**Review Year Groups - 2021/2022**

Please note that you can only edit these enrolments if they are future enrolments or if the student does not yet have an enrolment. To edit a student's current enrolment please use the individual student's enrolment page.

Student	Year Group
Adams Abbie	<span>Year 4 (2021/2022)</span>
Adams Dean	Year 1 (2021/2022)
Adams Jade	Year 2 (2021/2022)
Adams Justine	Year 3 (2021/2022)
Allen Callum	<span>Year 4 (2021/2022)</span>

### Students added after completing step 3

If you've already promoted year groups and reg forms, any new students you add on to Arbor won't show up in the 'Tweaks' or Review sections.

Instead, you'll need to go to their Student Profile and add them to the year group and registration form from the Enrolments section. You can see how to do this in [this article](#).

### Can't add students to a year group/registration form?

If you have registration forms with students in more than one year group, you might not be able to select students because you need to link the registration form to both year groups. You can see how to resolve this here: [Mixed year group registration forms](#)

# Step 4 - Custom Groups

The next step is to copy over your Custom Groups for the next academic year.

4. Custom Groups		Available
5. Houses	4. Custom Groups	Available
6. Courses & Classes	Custom Groups setup is available and needs to be marked as complete	Locked
7. Meals		Available
8. Interventions		Available

## Custom Groups

**Setup 2021/2022**

**1. Copy custom groups from 2020/2021** Optional ▶

**Review**

**Custom Groups (2021/2022)** + Add

*No Custom Groups exist for 2021/2022*

In the slide over, you can select which groups you would not like to copy over, which groups you would like to copy over with no student enrolments, and which groups you would like to copy over completely, including the students who are enrolled in the group.

Please note that when selecting **Copy Group and Members**:

- Custom groups where students, staff or guardians have been added manually will have the people in the custom group copied over
- Where they've been added using **Automatic Membership Criteria**, the people will not be copied over, and you'll need to add the Automatic Membership Criteria again. This is because Automatic Membership Criteria are based on information for a specific academic year.

<b>Social worker*</b>	Copy Group and Members	✕	▼
<b>Unable to provide wraparound care*</b>	Do Not Copy	✕	▼
<b>Vulnerable*</b>	Copy Group and Members	✕	▼

Cancel Copy Custom Groups

You can also set up entirely new custom groups as needed by clicking **+Add**.

**Review**

Custom Groups (2021/2022) + Add

To enrol students in a custom group manually or using Automatic Membership Criteria, click into a custom group, then click **More**, then follow [these instructions](#). You can also delete a group you've set up incorrectly from here.

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**Example custom group (2021/2022)**

**Members**   Setup   Actions

**Current and Future Members** + Add

There are no results Download ▼

	Person	Start Date	End Date
No current members			

**Former Members**

There are no results Download ▼

	Person	Start Date	End Date
No former members			

**Attachments**



*Drag or click to upload*

Download Student List

Delete Group

# Step 5 - Houses

The next step is to set up your Houses for the next academic year. This step is optional, so if you do not use Houses just click on the green **Mark as Complete** button.

5. Houses		Available
6. Courses & Classes	5. Houses	Available
7. Meals	Houses setup is available and needs to be marked as complete	Available
8. Interventions		Available
Review School Year Setup		

You can copy your Houses over from the current academic year.

## Houses

**Setup 2021/2022**

1. Copy houses and house enrolments
0 out of 4 houses copied
▶

**Review**

**Houses (2021/2022)**
+ Add

*No Houses exist for 2021/2022*

In the slide over, select which houses you would like to copy over. Students who are enrolled in a house for the current academic year will be enrolled in the same house in the next academic year. Current house tutors will remain assigned.

## Copy Houses and House Enrolments

Below is a list of all houses in the current academic year. Tick the ones you would like to copy to the next academic year and untick the ones that should not be copied. Students who are enrolled in a house for the current academic year will be enrolled in the same house in the next academic year as part of copying the houses. Current house tutors will also be set as tutors of the new house.

### Houses (2020/2021)

- Acklam**  Copy House and Members
- Colville**  Copy House and Members
- Ladbroke**  Copy House and Members
- Westbourne**  Copy House and Members

Cancel

Copy

You can also set up entirely new houses as needed by clicking **+Add**.

## Create House - 2021/2022

Academic Year 2021/2022

House Name\*

Short Name

Cancel

Save Changes

To edit the student enrolments in the House, or change the staff assigned, click into a House.

### House Overview - Acklam (2021/2022)

Name	Acklam	▶
Short name	Acklam	▶
Academic year	2021/2022	▶
Students	177	

### Head of House

*No results found*

[+ Add](#)

[Head of House](#)



*Drag or click to upload*

**Delete House**

Browse Student Profiles

# Step 6 - Courses & Classes

The next step is to manage Courses and Classes for the next academic year.

**All schools must complete this step, including primary schools. If you do not complete this step, you will not have any registers in September.**

5. Houses		Complete
6. Courses & Classes		Available
7. Meals	6. Courses & Classes	Available
8. Interventions		Available
Review School Year Setup	Courses & Classes setup is available and needs to be marked as complete	

## Nursery registration sessions

If you have a nursery, you will need to schedule registration sessions differently. Because your students may not be attending full time, you will need to schedule registration forms and enrol your nursery students into them differently, depending on whether they attend during the same times every day or not.

**You must follow the instructions in our [Scheduling your Nursery registers guide](#) (you can find this [here](#)) before following the instructions below to schedule your other year group's registers.**

## Scheduling your registration sessions

For primary schools, we recommend selecting option **A. Schedule Sessions from Registration Forms**.

### Courses & Classes

**Setup 2021/2022**

Please ensure you choose only one setup option for each class. Completing more than one option risks you duplicating courses or lessons.

**A. Schedule Sessions from Registration Forms** Optional ▶

This will bring you to a list of all the registration forms you have. Tick the box next to the blue pencil icon to select all the registration forms, then click the blue pencil icon to select **Schedule Registration Forms**.

## Setup Registration Forms

Academic Year 2021/2022

Registration Forms in 2021/2022		
<input type="checkbox"/> Registration Form	Year Group(s)	Status
<input type="checkbox"/> <b>Schedule Registration Forms</b>	N2 (2021/2022) and N1 (2021/2022)	Already Timetabled
<input checked="" type="checkbox"/> Form REAZ (2021/2022)	Reception (2021/2022)	Not Timetabled
<input checked="" type="checkbox"/> Form REGT (2021/2022)	Reception (2021/2022)	Not Timetabled
<input checked="" type="checkbox"/> Form 1MJ (2021/2022)	Year 1 (2021/2022)	Not Timetabled
<input checked="" type="checkbox"/> Form 1TP (2021/2022)	Year 1 (2021/2022)	Not Timetabled

A slide-over will appear where you enter the start and end times for the Registration Forms you have selected.

Enter the start and end times, making sure your Morning end time falls at the beginning of lunchtime (to prevent errors during Census), and your Afternoon end time is the end of the school day. Leave a gap for lunch.

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### Schedule Registration Forms

<b>Morning start time</b>	<input type="text" value="08:00"/>	
<b>Morning end time</b>	<input type="text" value="12:00"/>	
<b>Afternoon start time</b>	<input type="text" value="12:45"/>	
<b>Afternoon end time</b>	<input style="border: 2px solid #00aaff;" type="text" value="15:30"/>	

Once the sessions have been timetabled, you can see these on the Setup Registration Forms page.

<input type="checkbox"/>	Form 1TP (2021/2022)	Year 1 (2021/2022)	Already Timetabled
<input type="checkbox"/>	Form 2GA (2021/2022)	Year 2 (2021/2022)	Already Timetabled
<input type="checkbox"/>	Form 2QH (2021/2022)	Year 2 (2021/2022)	Already Timetabled

When you return to the **Courses & Classes** page you will now see a list of all the scheduled Registration Forms.

You can then click the green **Mark as complete** button if you don't want to schedule any more classes to let the system know that you've completed this step.

+ Reception	▶
- Year 1	▶
Form 1FS	▶
Form 1PS	▶

### Important note about scheduling reception

If you have a Reception you will also need to choose if you will be using regular attendance patterns for your Reception students or not. Using attendance patterns means that your students attend between the same times every day, for example, if your students attend Mon-Fri mornings only.

Some Registration form(s) selected are Reception classes. Please choose below if you would like to set up separate course modules per day for these classes.

Create separate modules per day for reception classes?  No, we will not be using attendance patterns

**Registration Forms to be scheduled**

Form REAZ (2021/2022)

**We recommend selecting 'no'**, as it is easier to make adjustments if necessary. If you select 'no':

- They will be set up like other year groups.
- All the lessons for the whole week will be scheduled directly against the top-level course for the reception class, without creating all the AM/PM bottom-level courses.
- Students will be automatically enrolled in sessions based on their enrollments into Registration Form groups.

The setup will look something like this:

Classes & Lessons <span style="float: right;">+ Add</span>	
Monday: 08:00 - 12:00 Staff: Maureen Jacobs	Scheduled ▶
Monday: 12:45 - 15:30 Staff: Maureen Jacobs	Scheduled ▶
Tuesday: 08:00 - 12:00 Staff: Maureen Jacobs	Scheduled ▶
Tuesday: 12:45 - 15:30 Staff: Maureen Jacobs	Scheduled ▶

If you select 'yes'

- They will be set up in the same way as Nursery registration sessions.
- Separate modules for each AM and PM session, for every day of the week, will be created and the lessons will be scheduled against those modules automatically.
- Each session will become a bottom-level course with one class time within it.
- You will need to make sure that you have set [attendance patterns](#) for your reception students for them to be automatically enrolled in these classes, and for them to appear on the register.

The setup will look something like this:

Academic Year 2021/2022 ▼

Courses & Classes <span style="float: right;">+ Add</span>	
+ Nursery	▶
- Reception	▶
- Form REAZ	▶
Monday AM	▶
Monday PM	▶
Tuesday AM	▶
Tuesday PM	▶
Wednesday AM	▶
Wednesday PM	▶
Thursday AM	▶
Thursday PM	▶
Friday AM	▶
Friday PM	▶

## Tidying up your registration structure for one-form years

When completing option A (Schedule Sessions from Registration Forms), this automatically created the registration form within a parent course for the year group. This means all of your class names can be quite long and repetitive if you only have one registration form within each year group.

To make your registration class the top-level module to simplify your setup, follow the instructions in [this article](#).

## Adding additional classes

If you have more classes than just the registration groups, you can set up additional classes. Make sure you have these pieces of information ready:

- What you will call the class and the subject name
- What room the class will be in
- Which teachers will be assigned to the class
- When the classes take place

Choose option **D. Setup Courses & Classes** from scratch. A slide-over will appear where you need to enter information about the course/class you are setting up.

You can only select one year group per course you create. Leave the **Year group** field blank to be able to create sub-modules assigned to different year groups.

When all the details are correct, click on the green **Add Course** button.

**Add New Course to 2021/2022**

Course name*	<input type="text" value="Music"/>
Abbreviation	<input type="text"/>
Department	<input type="text"/>
Academic lead	<input type="text" value="Adrian Parker"/>
Subject	<input type="text" value="Music"/>
Year group	<input type="text"/>

This creates the course (the top-level component). The next step is to set up class groups if not all of your students will be in this lesson at the same time.

To do this, from the Course Overview, click **+Add** in the **Modules** section.

### Modules

No modules added Click [Add new module](#)

Name	Students	Info
No rows to display.		

In the slide over add the name of the module and fill in the other details. In my example, year 5 and 6 do a music class so I'll need to add a module for each. Select the year group then click the green **Add Module** button.

### Add New Module

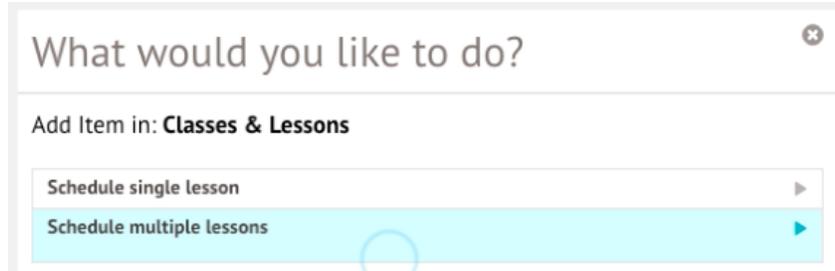
Module name*	<input type="text" value="Y5 Music"/>
Abbreviation	<input type="text"/>
Department	<input type="text"/> ▼
Academic Lead	<input type="text" value="Adrian Parker"/> ✖ ▼
Subject	<input type="text" value="Music"/> ✖ ▼
Year group	<input type="text" value="Year 5 (2021/2022)"/> ✖ ▼

You will be taken to the module overview. To schedule lessons for this class, click **+Add** in the **Classes & Lessons** section.

### Classes & Lessons

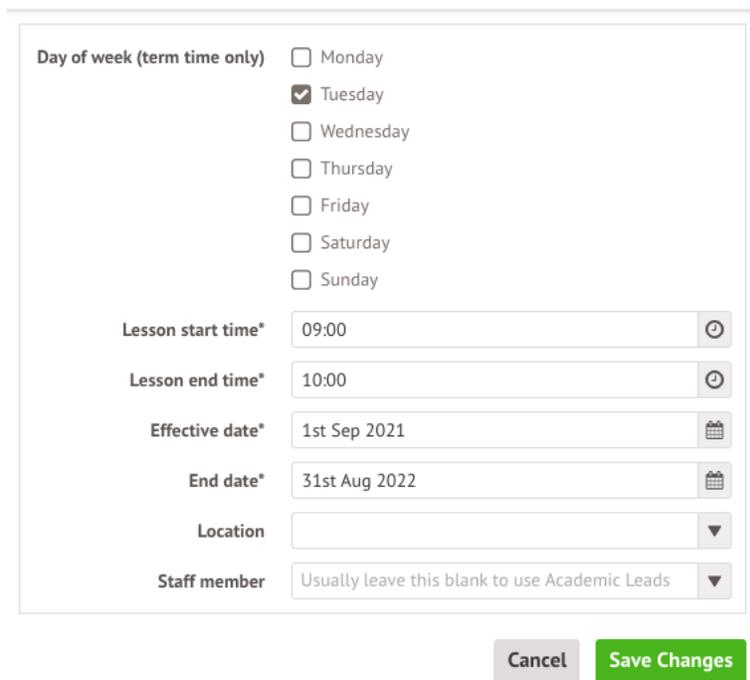
No lessons scheduled

You can then choose to schedule multiple regular lessons.



In the sideover, select the days the lessons will run on, the time, effective dates, location, and the teacher. This ensures this person sees this lesson in their calendar.

### Schedule multiple lessons



## Enrolling your students

The next step is to enrol your students into this class, so they will appear on the registers.

We recommend using our bulk enrolment page by going to **Students > Enrolment > Courses > Bulk Enrolment**. You can see how to enrol students into their registers from here following this guide: [Bulk enrol students into lesson registers](#)

## Make sure you have registers for your first day back

If you don't have registers set up, your teachers won't be able to take attendance on your first day back! To check they've been set up, first take a look at when your registers should start. Go to **School > School Structure > Academic Years**, then select the upcoming academic year.

### Academic Years

Academic Years		<a href="#">+ Add</a>
2021/2022	01 Sep 2021 - 31 Aug 2022	<a href="#">▶</a>

In the example below, the first day of the term is the 1st. However, as I have put the 1st, 2nd and 3rd as inset days, the first day I need to take attendance is 6th of September.

Holidays (2021/2022)		
Summer	01 Sep 2021 - 03 Sep 2021	Vacation
Autumn half term	25 Oct 2021 - 29 Oct 2021	Half-Term

Next, go to **Students > Attendance > Registers By Date**. Click the calendar icon, and select the first day your registers should exist for, then click **Change Date**.

7th Sep 2020  [Change Date](#)

If you've set up your registrations correctly, they should appear on this page! If they don't, and you're sure you haven't scheduled a holiday on this day, this means you haven't scheduled your timetable to start on the right date or you haven't enrolled students in your Courses and Classes.

# Step 7 - Meals

Meals setup is another optional step. If you don't use Meals in Arbor do not enter any information into this section and click on the green **Mark as Complete** button.

You will see there are 4 parts to setting your Meals up successfully.

1. Copy Meals and Meal Provisions	Incomplete	▶
2. Copy Meal Sitings and Attendees	Incomplete	
3. Copy Meal Prices	Incomplete	
4. Copy Meal Choices	Optional	

## Copy Meals and Meal Provisions

Click on **Copy Meals and Meal Provisions**. A slide over will appear containing a list of the Meals and Meal Provisions for the next year. Tick the ones you would like to copy to next year, and untick the ones that should not be copied. **For any provision that is ticked, the meal it belongs to will automatically be copied over.**

When you are happy you have selected the meals you want to copy over click on the green **Copy** button at the bottom of the slide-over.

### Lunch

Meal provisions

- Absent
- Cold Lunch
- Hot Lunch
- Packed Lunch

You can set up meals from this page, either by clicking into the **Make further changes to meals section** if you already have other meals or by clicking to create a meal if you have

not used Meals before. The process to set a meal up through New School Year Setup is similar to the standard process, shown here: [Setting Up Meals](#)

### Need More Changes?

If you need to make more complex changes than can be achieved by copying the setup from 2020/2021, please click below. This will take you to the Meals module where you can make more changes manually.

Make further changes to Meals 

## Meals

### Setup 2021/2022

No meals exist for 2020/2021, click to create some for 2021/2022 

## Copy Meal Sittings and Attendees

Click on step 2. Tick the meal sittings and attendees you would like to copy and untick the ones that should not be copied. **If you do not copy the sitting timetable or at least one sitting attendee group, the sitting itself will not be copied.**

We recommend copying over your attendees to make sure teachers can access the Meal Register for their classes.

### Lunch Sitting

#### Sitting 1

Copy sitting timetable  Mon: 12:00 - 12:45, Tue: 12:00 - 12:45, Wed: 12:00 - 12:45, Thu: 12:00 - 12:45 and Fri: 12:00 - 12:45

Copy sitting attendees

- Form 1MJ (2021/2022)
- Form 1TP (2021/2022)
- Form 2QH (2021/2022)
- Form 2VG (2021/2022)

## Copy Meal Prices

Click on Step 3. Tick the prices you would like to keep and untick the ones you would like to discard. The current price is shown in brackets, but this can be changed later.

Prices for Provision: Absent	
Absent (£0.00)	<input checked="" type="checkbox"/> All Students

Prices for Provision: Packed Lunch	
Packed Lunch (£0.00)	<input checked="" type="checkbox"/> All Students

Prices for Provision: School Packed Lunch	
FSM (£0.00)	<input checked="" type="checkbox"/> Free School Meal
Paid (£2.20)	<input checked="" type="checkbox"/> All Other Students

## Copy Meal Choices

Step 4 is optional and will depend on whether you want meal registers to be pre-filled with student's regular meal choices. If you do, click **Copy Meal Choices**.

### Copy Student Meal Choices

This page lets you copy the regular meal choices for all students from 2020/2021 to 2021/2022.  
Even if you have already copied meal choices once, duplicates (i.e. meal choices with the exact same settings) will not be created.  
Meal choices will only be copied for students enrolled in 2021/2022.

## Why have Meal Choices not copied over?

For meal choices to copy over for students, the meal choice needs to have an end date that is the same as or later than the last day of Summer term for your school.

You'll need to make sure that the Summer Term in your academic calendar lasts until your last good school day, not until the end of the summer holidays. In the example below, meal choices that end on the 30th August would not be copied over.

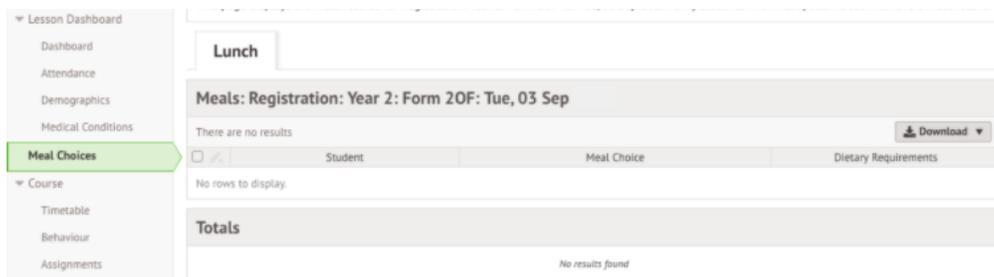
Terms (2021/2022)		+ Add
Autumn	06 Sep 2021 - 17 Dec 2021	▶
Spring	04 Jan 2022 - 01 Apr 2022	▶
Summer	19 Apr 2022 - 31 Aug 2022	▶

Holidays (2021/2022)		+ Add
Summer	01 Sep 2021 - 03 Sep 2021	Vacation ▶
Inset	06 Sep 2021	Inset ▶
Autumn half term	26 Oct 2021 - 29 Oct 2021	Half-Term ▶
Christmas	20 Dec 2021 - 03 Jan 2022	Vacation ▶
Spring half term	21 Feb 2022 - 25 Feb 2022	Half-Term ▶
Easter	04 Apr 2022 - 18 Apr 2022	Vacation ▶
Early May Bank Holiday	02 May 2022	Public Holiday ▶
Summer half term	30 May 2022 - 03 Jun 2022	Half-Term ▶
Summer	28 Jul 2022 - 31 Aug 2022	Vacation ▶

## Check you'll have meal registers in September

You'll need to make sure you've set up meals correctly to ensure you'll be able to select student's meal choices in the Meal Registers. If you have not yet set your attendees for meals, or you haven't set meal patterns, your meal registers will look like the below.



Student	Meal Choice	Dietary Requirements
No rows to display.		

Totals
No results found

To fix this, go to **School > Meals > Setup**. Select the next academic year from the drop-down menu.

Lunch	
Meal name: Lunch	✓
Provisions	✓
Prices	✓
Meal Sitzings Scheduled	✓
Attendees	✗
Meal Choices & Dietary Requirements	✗

Click into **Attendees** and go to the **Automatic Group Attendees** tab. Click **+Add** to add students.

Meal Patterns	Automatic Group Attendees	Students Without Regular Meal Patterns
Sitting 1		+ Add
<i>No automatic group attendees setup.</i>		

Select all the registration forms to add to the meal, then click **Add Automatic Attendees**.

### Add Automatic Attendees

Automatic Attendees\*

Form 1IB

Form 1II

Form 2CR

Form 2OF

Form 3SX

Form 3XV

Form 4CW

Form 4QY

Form 5QX

Form 5SF

Form 6DM

Form 6LH

Cancel
Add Automatic Attendees

This will then generate your meal registers. You can add meal choices for your students from here.

**Lunch**

**Meals: Registration: Year 2: Form 20F: Tue, 03 Sep**

Showing 30 results Download ▾

<input type="checkbox"/>	Student	Meal Choice	Dietary Requirements
<input type="checkbox"/>	Baker Summer		
<input type="checkbox"/>	Banik Anusha		
<input type="checkbox"/>	Carter Karen		

If you want to set a regular meal choice that students will have every day, you can go to **School > Meals > Setup > Meal Choices & Dietary Requirements > Students without a Meal Choice**. You can then assign them a meal choice individually or in bulk.

**All Meal Choices** **Students Without Meal Choice**

Showing 351 results Download ▾

<input type="checkbox"/>	Student	Reg. Form
<input checked="" type="checkbox"/>	Add Meal Choice	Form 11B
<input checked="" type="checkbox"/>	Murray Jennifer	Form 11I

# Step 8 - Interventions

If you are not using the Interventions module or will not be running the same interventions groups in the next academic year then just click on the green 'Mark as complete' button.

To copy over the interventions click on **1. Copy interventions.**

## Interventions

**Setup 2021/2022**

1. Copy Interventions 0 out of 1 Interventions copied ▶

**Review**

**Interventions (2021/2022)**

*No Interventions exist for 2021/2022*

Tick the interventions you would like to copy over to next year, and then click **Copy Interventions.**

### Copy Interventions

Below is a list of all Interventions in the current academic year. Tick the ones you would like to copy to the next academic year.

**Interventions (2020/2021)**

Intervention	<input checked="" type="checkbox"/>	Covid-19 contact
Intervention	<input checked="" type="checkbox"/>	Maths intervention

Click on an intervention to visit the overview.

Review	
Interventions (2021/2022)	
Covid-19 contact	▶
Maths intervention	▶

You'll need to then complete the intervention setup to create intervention groups, add students and schedule intervention sessions. You can see how to do this here: [Setting up a new intervention](#)

## Maths intervention

[Print to PDF](#)

Overview	Timetable slots	Intervention Details	Students	Costs and Funding
<b>Intervention details</b>				
Category				
Participant Criteria	None set			
Effective dates	01 Sep 2021 - 31 Aug 2022			
<b>Intervention Groups</b> <a href="#">+ Add</a>				
Group Name		Enrolled Students	Timetable Slots	Lead Staff Member
No rows to display.				
<b>Intervention Reviews</b> <a href="#">+ Add</a>				
There are no results <a href="#">Download</a> ▼				
Due date		Completed		
There are no results				

# Review School Year Setup

Once you have marked the final section as complete, you will be taken back to the Setup overview, where you can see all stages should be marked as **Complete**.

1. Academic Calendar	Complete
2. Off-Roll Leavers	Complete
3. Year Groups & Registration Forms	Complete
4. Custom Groups	Complete
5. Houses	Complete
6. Courses & Classes	Complete
7. Meals	Complete
8. Interventions	Complete
Review School Year Setup	

The last step of the workflow is to review your setup for the next academic year. Use our **New School Year Setup Checklist**, available on the Help Centre [here](#).

To see everything you have entered in the setup process, click the last step on the **Overview** page. You can click on any of the cells with an arrow beside them to review the information, such as the enrolments.

## Review School Year Setup

2021/2022 New School Year Setup Review	
Review enrolments for next academic year	▶
Review attendance patterns for next academic year	▶
Setup timetable for the next academic year	▶

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## Review Enrolments

Review Enrolments (2021/2022)			
Student	Year Group	Registration Form	House
Adams Abbie	Year 4 (2021/2022)	Form 4SU (2021/2022)	Acklam (2021/2022)
Adams Dean	Year 5 (2021/2022)	Form 1MJ (2021/2022)	Colville (2021/2022)
Adams Jade	Year 4 (2021/2022)	Form 1TP (2021/2022)	Westbourne (2021/2022)

You can also review your Year Groups and Registration Forms.

Year 3 (2021/2022)	55 students, promoted from Year 2 Head of Year: Elsie Parker Registration Forms Form 3AI (2021/2022): 28 students, promoted from Form 2QH Tutor : Shania Redfield Form 3BG (2021/2022): 27 students, promoted from Form 2VG Tutor : Elsie Parker	▶
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If you need to add any new year groups or registration forms, just click **+Add**.

What would you like to do? ✕

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Add Item in: **2021/2022 Year Groups and Registration Forms**

Add year group to 2021/2022	▶
Add registration form to 2021/2022	▶

Clicking on a Year Group will allow you to see all the students enrolled in it, or you can click **More Information** to view and edit the setup of your year group further.

« Back
**Year Group Year 3 (2021/2022)**

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**Year Group Details**

Name	Year 3 (2021/2022)
Head of Year	Elsie Parker

[More Information »](#)

**Students (55)**

Allen Leo
Anderson Millie

For example, you can click on the registration form to access that page and edit it, such as if you want to edit the name.

**Registration Forms**

Form 3AI (2021/2022)	▶
Form 3BG (2021/2022)	▶

**Automatic Enrolments into Courses** + Add

Year 3 (2021/2022)	▶
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**Heads of Year** + Add

Parker Elsie	01 Sep 2021 - 31 Aug 2022 ▶
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# Other things to prepare

## Assessments

If you use assessments in Arbor, you'll need to copy your assessments across to next year. They will not automatically copy over. To see how to do this, follow the instructions in this article: [Copying Assessments to the coming year](#)

## Data Collections

Data Collection Policies are linked to the Assessment policy. Because you need to select the assessments to create or copy over each year, you also need to define your Data Collection Policies each year if you use them at your school. You can see how to add Data Collections [here](#).

## Behaviour

When the new school year begins, you'll need to set up certain areas of behaviour.

Don't worry, you won't need to set everything up. To prepare for September, you'll just need to set up detentions and add your Internal exclusion types. You can see how to do this in this article: Setting up [Behaviour in Arbor](#)

## My Classroom

If your school uses My Classroom, there are certain steps that need to be completed each year for you to be able to use it.

You can use layouts from past years as these are linked to the room, but you will need to set up seating plans each year as there will be different students in your classes. You can see how to do this [here](#).

Because teachers can access My Classroom at any time for their lessons, once you've completed Step 6 of the New School Year Setup process to schedule your classes, your teachers will be able to set up their seating plans before students return in September.

## School Shop

If you use the School Shop on your site, the products will remain active, and available to the students who were in the student groups selected last year. To make the items available to new students, or different student groups, you'll need to add the new students groups, then add prices for them: [School Shop](#)

# Additional resources

You can get support from us in-app! Just click on the **Chat** bubble in the bottom left of your site. Take a look at how to get the most out of our chat functionality here:

[Using Webchat](#)

For more support, including how to sign up for our upcoming webinars or book in a 15-minute session with our expert Support Team, check out our [New School Year Setup help and guidance](#).

We've also got articles and videos on our Help Centre. Click **Help Centre** in your Arbor site and search, or go to this link: [New School Year Setup](#)

