Producing the School Census Spring 2023 Return

English Primary and Middle deemed Primary

applicable to 7.210 onwards

Handbook

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Overview

This handbook provides the information needed by Primary/Middle deemed Primary schools in England to complete the School Census Summer 2023 Return.

The School Census Summer Return is required to be completed by maintained Nursery schools, Primary schools, Middle schools, Secondary schools, All-Through schools, Special schools, Pupil Referral Units (PRUs), City Technology Colleges (CTCs) and Academies (including free schools) in England. Non-maintained Special schools are also required to submit the return.

Currently, there are three School Census returns each year (i.e. Spring, Summer and Autumn), which collect detailed information about school characteristics and pupil details, e.g. pupil address, free school meals, exclusions, etc. Different data is collected depending on which return is being prepared and your school phase.

A list of items collected from Primary/Middle deemed Primary schools in England for the School Census Summer 2023 Return is available in a later section of this handbook (please see *Preparing Data for the School Census Return* on page *6*).

> *NOTE: The contents of the graphics (dates, names, panel numbers, etc.) are examples only of what you might expect to see when using SIMS to produce the School Census Return.*

More Information:
Preparing Data for the School Census Return on page *6*

How has the School Census Summer Return Changed?

Changes to the School Census Summer Return include the following:

School Census Summer 2023 Key Dates

- Census day 18/05/2023
- Attendance collected from 01/01/2023 to 09/04/2023
- Exclusions collected from 01/08/2022 to 09/04/2023
- Alternative Provision Placements collected from 19/01/2023 to 18/05/2023
- Funding and Monitoring collected from 01/08/2022 to 18/05/2023
- Free School Meal Eligibility collected from 20/10/2023 to 18/05/2023.

Attendance Information - Manual Entry

Not applicable to Nursery schools

The number of sessions that a pupil is unable to attend due to Coronavirus is no longer being collected. Therefore, the total coronavirus sessions (**T Corona Sessions**) column has been removed from the **Attendance** panel used by schools that enter attendance information manually.

More Information:
SIMS Attendance Not in Use on page *41*

Alternative Provision

Not applicable to Nursery schools

Focus | Pupil | Pupil Details

Routines | Statutory Return | School Census

Two new Alternative Provision data items are being collected in the Summer census where AP Setting is recorded:

- Companies House Number
- Alternative Provision Postcode.

These two new items are also included in the Alternative Provision detail report, which can be accessed via the School Census menu route.

More Information:
Alternative Provision Report on page *50*

Where to Find More Information

Online help can be accessed by pressing **F1** or clicking the applicable **Help** button in SIMS.

A wide range of documentation is available from the SIMS **Documentation Centre**, including handbooks, quick reference sheets and tutorials. Click the **Documentation** button located on the top right-hand side of the SIMS **Home Page**, select the required category, then select the document you require.

Additional Information

In addition to this handbook, a preparation guide that outlines how to prepare your data for the School Census, is also available from the SIMS **Documentation Centre**.

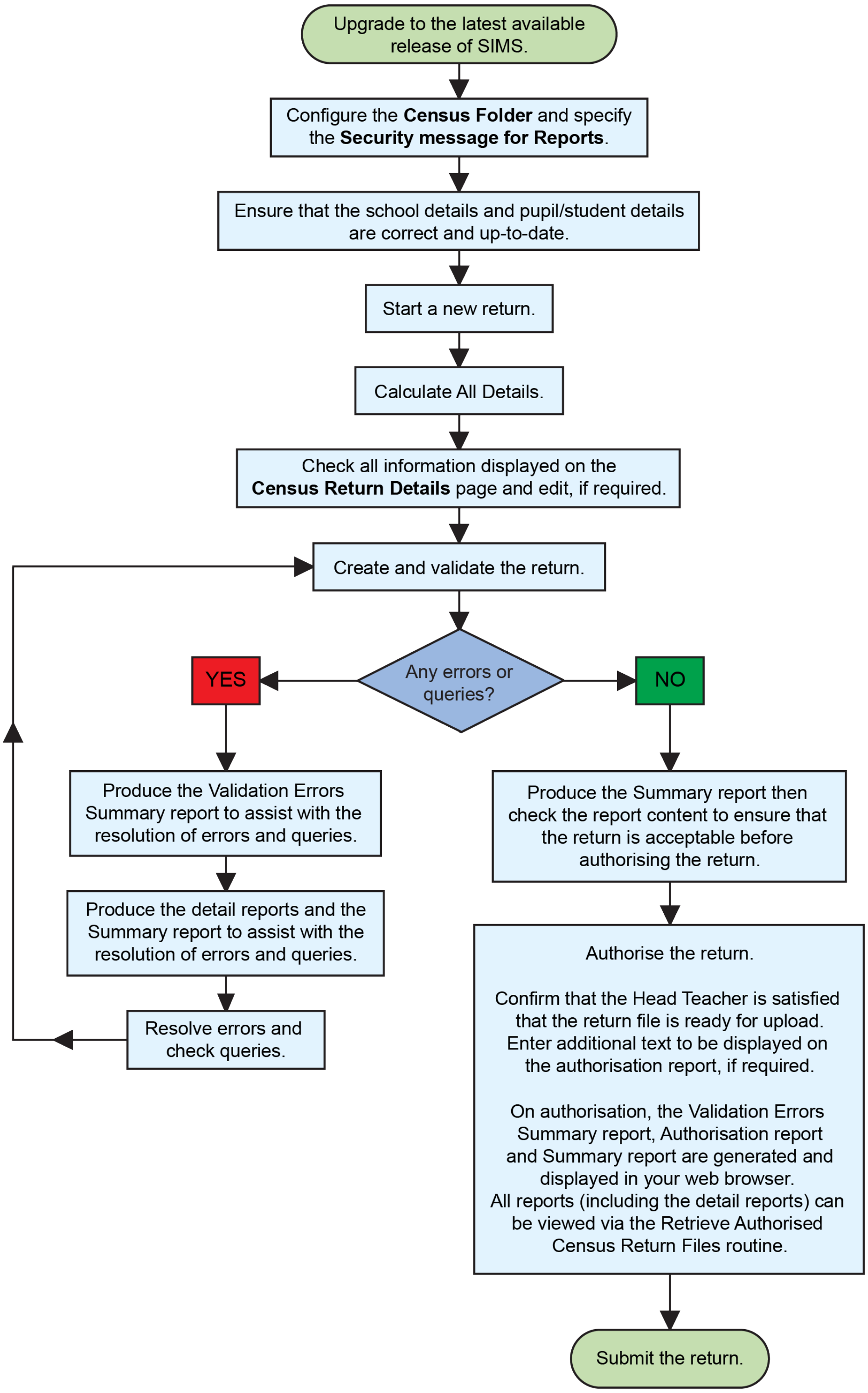
You are strongly advised to check the following SIMS Newsfeeds because they provide a range of explanatory text, presentations, videos and spreadsheets that you may find useful. These newsfeeds are updated regularly to provide the latest news and answers to enquiries. In particular, the newsfeeds for School Census provide the latest iteration of our spreadsheet for DfE validation rules and SIMS solutions.

The SIMS Newsfeed - Main Hub provides links to all the statutory returns related newsfeeds (https://customer.support-ess.com/csm?id=kb_article_view&sysparm_article=KB0035899).

- SIMS Newsfeed - School Census Summer 2023
- SIMS Newsfeed - DfE CBDS 2022/23
- SIMS Newsfeed - Series 2400 Filesets for SIMS 7 Spring Release 2023.

Steps to Producing the School Census Return

The process of producing the School Census can be separated into several steps, some of which might need to be repeated to eliminate validation errors and queries.


Upgrade to the latest available release of SIMS.
Configure the **Census Folder** and specify the **Security message for Reports**.
Ensure that the school details and pupil/student details are correct and up-to-date.
Start a new return.
Calculate All Details.
Check all information displayed on the **Census Return Details** page and edit, if required.
Create and validate the return.
Any errors or queries?
YES
NO
Produce the Validation Errors Summary report to assist with the resolution of errors and queries.
Produce the detail reports and the Summary report to assist with the resolution of errors and queries.
Resolve errors and check queries.
Produce the Summary report then check the report content to ensure that the return is acceptable before authorising the return.
Authorise the return.
Confirm that the Head Teacher is satisfied that the return file is ready for upload. Enter additional text to be displayed on the authorisation report, if required.
On authorisation, the Validation Errors Summary report, Authorisation report and Summary report are generated and displayed in your web browser.
All reports (including the detail reports) can be viewed via the Retrieve Authorised Census Return Files routine.
Submit the return.

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Setting SIMS Permissions

The following permissions are applicable to users who deal with returns.

Running the Return

To run the return, you must be a member of one of the following user groups in System Manager:

- Returns Manager
- Returns Operator.

Editing and Preparing Data

Users who edit and prepare data must have permissions to access additional areas of SIMS, e.g. pupil details, school details, etc. These users must be a member of the user groups applicable to the areas they are editing (please see *Where to find More Information about Permissions* on page *6*).

Permissions Required to Import a Revised Fileset

The Import Fileset functionality enables updates to the Validation Errors Summary and the Summary report (derived from files supplied by the Statutory Body), and detail reports (provided by SIMS) to be imported into SIMS between SIMS releases.

To use the Import Fileset functionality (via **Tools | Setups | Import Fileset**), you must be a member of one of the following user groups in System Manager:

- Returns Manager
- System Manager.

For more information about the Import Fileset functionality, please refer to the applicable preparation guide. To access the SIMS **Documentation Centre**. Click the **Documentation** button located on the top right-hand side of the SIMS **Home Page**.

Where to find More Information about Permissions

Please contact your System Administrator/Manager if you are not sure whether you have the required permissions. For more information, please refer to the *Managing SIMS Users, Groups and Databases* handbook.

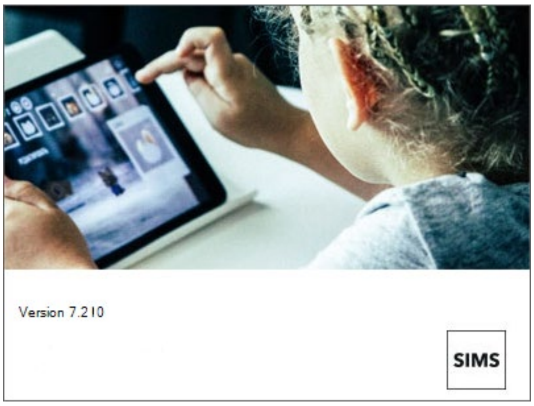
The SIMS Permissions spreadsheet describing the numerous permissions available in SIMS is available on the support portal (https://customer.support-ess.com/csm?id=kb_article_view&sysparm_article=KB0036819).

What Version of SIMS is Required?

To run the return, you must have the SIMS 2023 Spring Release (7.210) or later installed.

To check which version of SIMS is installed, open SIMS and then select **Help | About SIMS**. A dialog similar to the one shown in the following graphic is displayed.

The version should read 7.210 or later.



Preparing Data for the School Census Return

Before beginning the process of producing the return, it is advisable to spend time ensuring that all school level and pupil level information is present and accurate in SIMS. For example, ensure that school details are correct, all new pupils have been added to SIMS, all leavers have been recorded and where applicable all exclusions have been recorded, etc.

The following information is collected from Primary/Middle deemed Primary schools for the School Census Summer 2023 Return.

School Level Data

- School Characteristics:
    - LA number
    - DfE establishment number
    - school name
    - school phase
    - school type
    - highest and lowest national curriculum year

  - intake type
  - governance
  - school email address and school telephone number.

Pupil Level Data

- Pupil Identifiers:
  - unique pupil number (UPN) and former UPN
  - surname, forename, middle names, preferred surname and former surname
  - gender
  - date of birth.
- Pupil Characteristics:
  - ethnicity
  - first language
  - free school meal eligibility start date, end date and UK country in which the eligibility applies, school dinner taken
  - service children in education indicator
  - top-up funding indicator
  - post looked after arrangements
  - funded hours, extended childcare hours, 30 hour code, disability access fund indicator and hours at setting
  - learner funding and monitoring type, code and hours
  - Early years pupil premium receipt (EYPPR)
  - early years pupil premium basis of funding (EYPPBF)
  - two year old basis for funding
  - Youth Support Services Agreement (YSSA) indicator (applicable to Middle deemed Primary schools only)
  - young carer identified by parent/guardian or school.
- Pupil Status:
  - enrolment status
  - date of entry
  - date of leaving
  - part-time indicator
  - boarder indicator
  - actual national curriculum year group.
- Class type (applicable to Primary schools only).
- Special Educational Needs:
  - SEN provision
  - member of SEN unit indicator
  - member of resourced provision indicator.
- Alternative Provision Placement (19/01/2023 to 18/05/2023):
  - unique reference number (URN)

  - UK provider register number (UKPRN)
  - setting type
  - companies house number
  - alternative provision postcode
  - placement reason
  - placement entry date
  - SEN provision at end of entry
  - placement leaving date
  - SEN provision at placement date of leaving
  - attendance pattern and sessions per week.
- Termly Exclusion Information (01/08/2022 to 09/04/2023):
  - exclusion category
  - reason for exclusion
  - exclusion start date
  - actual number of sessions from which the pupil was excluded
  - SEN provision (formerly stage).
- Pupil Home Address Information: pupil's home address details, including post code and unique property reference number (UPRN).
- Termly Attendance Information (01/01/2023 to 09/04/2023):
  - If SIMS Attendance is in use: all attendance categories are collected in the census.
  - If SIMS Attendance is not in use: possible sessions, sessions missed due to authorised absence, sessions missed due to unauthorised absence, attendance codes and number of sessions missed, sessions attending approved educational activity, sessions unable to attend due to exceptional circumstances.

For more information and instructions on all of the preparations that need to be carried out before the census return is produced, please refer to the applicable *Preparing for the School Census Summer 2023* guide.

The preparation guide, together with other useful School Census documentation, is available from the SIMS **Documentation Centre** (accessed via the **Documentation** button, which is located on the top right-hand side of the SIMS **Home Page**).

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Editing Pupil Reconciliation .... Error! Bookmark not defined.
Entering Attendance Information 39
Entering General Information .... Error! Bookmark not defined.
Entering Infant Admissions Appeals Totals Error! Bookmark not defined.
Entering Primary Admissions Appeals Totals Error! Bookmark not defined.

Creating a New School Census Return

Before creating a new School Census return, ensure that all pupil and school information is present and accurate in SIMS.

The School Census Summer 2023 Return collects data for:

- all pupils on the register on 18/05/2023 (census day).
- any additional pupils not on-roll on census day who:
    - had at least one Attendance session during the collection period from 01/01/2023 to 09/04/2023 (please see *Attendance Report* on page *47*).
    - had exclusions that started between 01/08/2022 and 09/04/2023 (please see *Exclusions Report* on page *47*).
    - had an alternative provision placement during the collection period from 19/01/2023 to 18/05/2023 (please see *Alternative Provision Report* on page *50*).
    - had funding and monitoring information during the date range 01/08/2022 to 18/05/2023 (please see *Funding and Monitoring Report* on page *49*).

The **Census Folder** and **Security message for Reports** must be specified before clicking the **New** button to create a new return. A message is displayed if a census folder has not been defined.

It is possible to create more than one return. This enables you to carry out dry runs so that you can check what data needs to be added or updated. Any unwanted returns can be deleted (providing they have not been authorised).

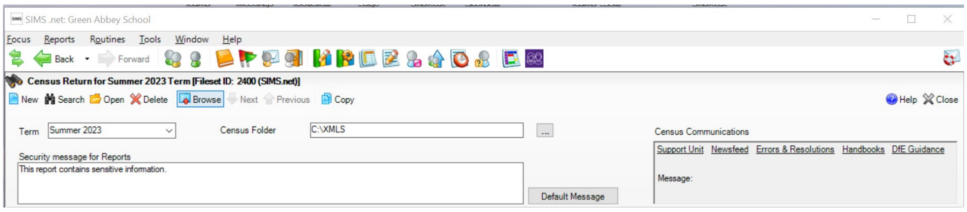
1. Select **Routines | Statutory Returns | School Census** to load the School Census validation and reporting files.

> *NOTE: The first time that the **Routines | Statutory Returns | School Census** menu route is selected during each SIMS session, there is a delay while the School Census files are loaded.*

When the files are loaded, the **Census Return** browser is displayed.

The **Census Communications** message box includes links to the newsfeed, errors and resolutions document, handbooks, DfE guidance and Support Unit website (if available). Any additional information to help with the completion of the return is also displayed, if applicable.

> *NOTES:*
>
> *The **Fileset ID** is displayed in the browser header (for information only). The following graphic shows the position for the first release in the 2400 fileset series, where the fileset is obtained from the `SIMS .net` folder. As soon as any further release in the series is imported, the reference to the `SIMS .net` folder is no longer displayed. This is because the fileset data is then obtained from the document server. Instead the import date is displayed adjacent to the **Fileset ID**.*
>
> *If a post-release consolidated database patch is applied, the patch ID and run date are also displayed in the browser.*


SIMS .net: Green Abbey School
Focus
Reports
Routines
Tools
Window
Help
Back
Forward
New
Search
Open
Delete
Browse
Next
Previous
Copy
Help
Close
...
Default Message
Census Communications
Support Unit
Newsfeed
Errors & Resolutions
Handbooks
DfE Guidance
Message:

Census Return for Summer 2023 Term [Fileset ID: 2400 (SIMS.net)]

Term: Summer 2023

Census Folder: C:\XMLS

Security message for Reports: This report contains sensitive information.

By default, the **Term** field displays the appropriate term for the selected return, in this instance **Summer 2023**.

2. Ensure that the **Census Folder** is configured correctly and that the required **Security message for Reports** is specified, as described in the following sections.

Configuring the Census Folder

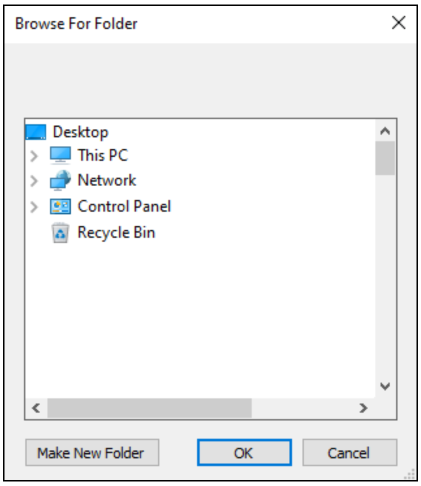
Before creating a return, the folder in which the return file will be saved must be specified.

> ***IMPORTANT NOTES:*** *Due to the sensitive nature of some of the data stored in SIMS, careful consideration must be given when specifying the location of any folder into which you save sensitive data, e.g. census returns, imported and exported CTFs, etc.*
>
> *You should be mindful of your school's responsibilities with respect to information security. Consider which users have access to the chosen folder, especially if the folder is shared on a server. Please refer to the government website for more information about securing your information (https://www.gov.uk/service-manual/technology/securing-your-information). If you are in any doubt, you should consult with your IT Security Officer before proceeding.*
>
> *The General Data Protection Regulation (GDPR), which replaces the Data Protection Act 1998, is a directive for certain safeguards regarding the use of personal data. It is important that schools process all data (not just the data collected for the school census) in accordance with the full requirements of the GDPR.*
>
> *Further information on the GDPR can be found on the Guide to the General Data protection Regulations (GDPR) page of the Information Commissioners Office (ICO) website (https://ico.org.uk/for-organisations/guide-to-the-general-data-protection-regulation-gdpr).*

1. In the School Workforce Census Folder field, enter the location of the folder where the return files are to be stored.

   Alternatively, click the **Browse** button to display the **Browse For Folder** dialog.

   ... *Browse button*



2. Navigate to the location of the required folder and highlight it. If a suitable folder does not exist, click the **Make New Folder** button, then enter a suitable name for the new folder.

   > ***IMPORTANT NOTE:*** *If you are changing the location of the folder, ensure that authorised personnel only have access to the new folder, as the folder will contain sensitive data. For more information, please see the important note at the beginning of this section.*

3. Click the **OK** button.

   A message dialog requests confirmation that you want to continue.
4. Click the **OK** button to select or create the folder and return to the browser, where the new folder name is displayed.
5. Ensure that the **Security Message for Reports** is appropriate for your school.

Specifying the Security Message for Reports

The **Security message for Reports** field displays the text that will be included in the header of each report.

The default text (**This report contains sensitive information**) can be edited, if required. Clicking the **Default Message** button reverts the amended text to the original default text.

When the security message and census folder are specified, a new return can be created. Click the **New** button to display the **Census Return Details** page.

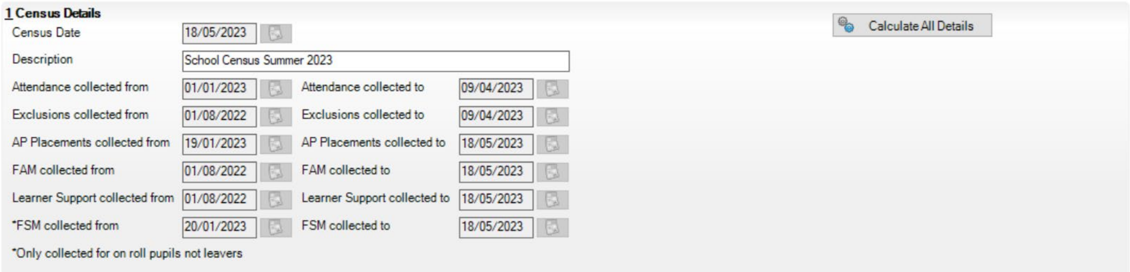
Editing Census Details

The **Census Details** panel displays the following dates (most of which are read-only):

- The census date is displayed as 18/05/2023.
- Attendance data collected from 01/01/2023 to 09/04/2023.

  The **Attendance Collected from** date displays the start date of the Spring term as recorded in the School Diary (via **Focus | School | School Diary**).
- Exclusions data collected from 01/08/2022 to 09/04/2023.
- AP (Alternative Provision) Placements collected from 19/01/2023 to 18/05/2023.
- FAM (Funding and Monitoring) collected from 01/08/2022 to 18/05/2023.
- FSM (Free School Meal) eligibility collected from 20/01/2023 to 18/05/2023 (applicable to on-roll pupils only).

1. By default, the return **Description** is displayed as **School Census Summer 2023** but can be edited, if required, e.g. to identify a dry run.



1 Census Details

Census Date	18/05/2023		
Description	School Census Summer 2023		
Attendance collected from	01/01/2023	Attendance collected to	09/04/2023
Exclusions collected from	01/08/2022	Exclusions collected to	09/04/2023
AP Placements collected from	19/01/2023	AP Placements collected to	18/05/2023
FAM collected from	01/08/2022	FAM collected to	18/05/2023
Learner Support collected from	01/08/2022	Learner Support collected to	18/05/2023
*FSM collected from	20/01/2023	FSM collected to	18/05/2023

*Only collected for on roll pupils not leavers

> ***WARNING:*** *Each description used must be unique. An error message is displayed if SIMS identifies a duplicate description.*
>
> *A unique description also helps to identify the required return when viewed in the **Census Return for Summer Term** browser and can be particularly useful when creating dry runs or copies of existing returns.*

2. Click the **Calculate All Details** button.

Calculating All Details

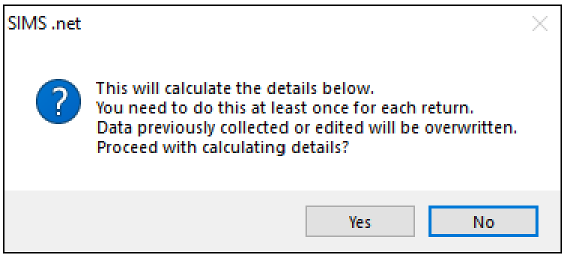
Clicking the **Calculate All Details** button extracts the required information from SIMS and displays the results in the applicable panels of the **Census Return Details** page.

> ***IMPORTANT NOTE:*** *You must calculate all details at least once to populate the various panels for each return.*
>
> *Do not use the **Calculate All Details** button more than once if you wish to keep any changes you have made. Clicking the **Calculate All Details** button overwrites any previously collected or edited data (in every panel where details are calculated automatically) with the data currently stored in SIMS.*

Any details that are calculated automatically should be checked and edited, if required.

1. Click the **Calculate All Details** button.

   A message advises that any existing data currently shown on the **Census Return Details** page will be overwritten.



This will calculate the details below.
You need to do this at least once for each return.
Data previously collected or edited will be overwritten.
Proceed with calculating details?

2. Click the **Yes** button to calculate all details.

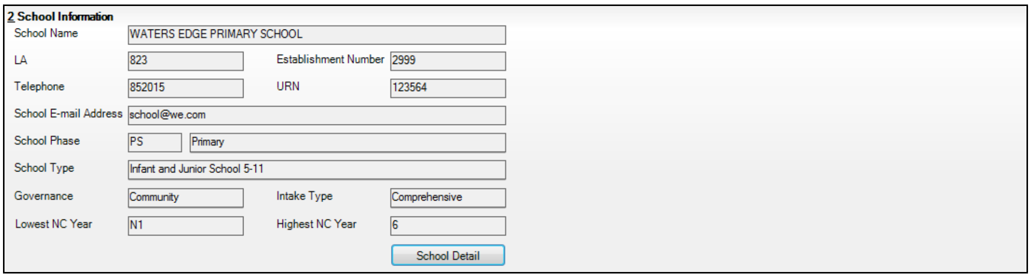
   At this point, depending on the number of pupils in the school, there might be a short delay while details are calculated.

   The applicable panels on the **Census Return Details** page are then populated with data.
3. The return can be saved at any point by clicking the **Save** button.

Editing School Information

The **School Information** panel displays details that have previously been recorded on the **School Details** page in SIMS (**Focus | School | School Details**). The information displayed might vary depending on your school and the details entered, e.g. Academy specific information.

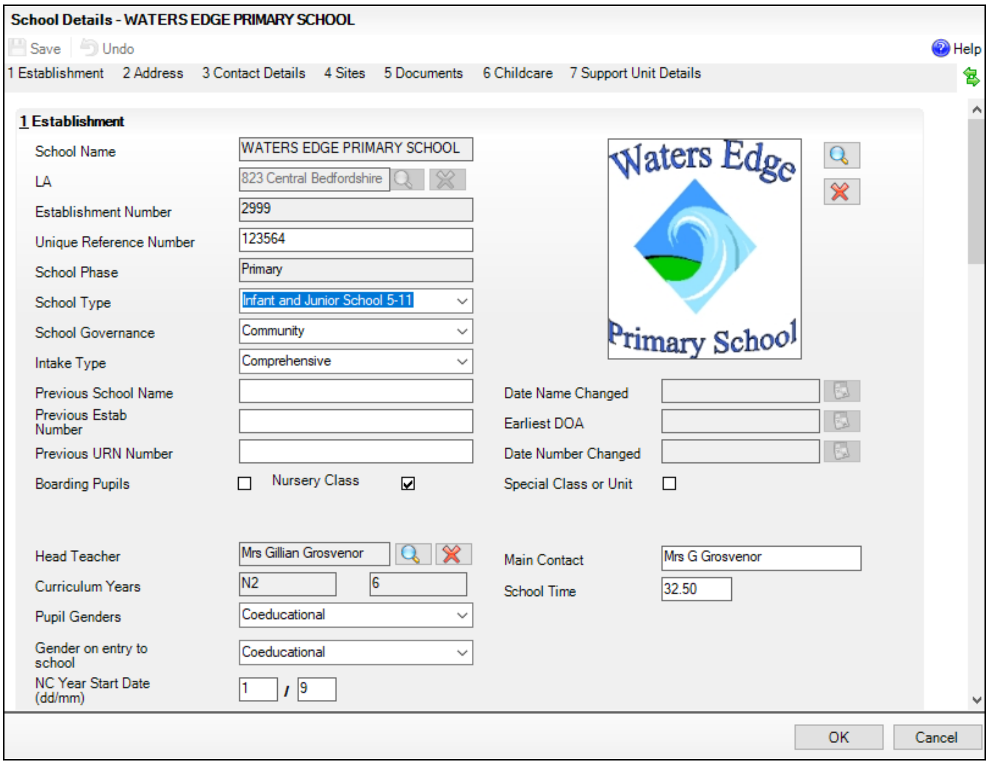
The details displayed are read-only but can be amended, if necessary, via the **School Detail** button.



2 School Information

School Name: WATERS EDGE PRIMARY SCHOOL
LA: 823
Establishment Number: 2999
Telephone: 852015
URN: 123564
School E-mail Address: school@we.com
School Phase: PS | Primary
School Type: Infant and Junior School 5-11
Governance: Community
Intake Type: Comprehensive
Lowest NC Year: N1
Highest NC Year: 6

1. If any details are missing or incorrect, click the **School Detail** button to display the **School Detail** dialog, where information applicable to your school is displayed.



School Details - WATERS EDGE PRIMARY SCHOOL

1 Establishment

School Name: WATERS EDGE PRIMARY SCHOOL
LA: 823 Central Bedfordshire
Establishment Number: 2999
Unique Reference Number: 123564
School Phase: Primary
School Type: Infant and Junior School 5-11
School Governance: Community
Intake Type: Comprehensive
Previous School Name:
Date Name Changed:
Previous Estab Number:
Earliest DOA:
Previous URN Number:
Date Number Changed:
Boarding Pupils ☐ Nursery Class ☑ Special Class or Unit ☐
Head Teacher: Mrs Gillian Grosvenor
Main Contact: Mrs G Grosvenor
Curriculum Years: N2 | 6
School Time: 32.50
Pupil Genders: Coeducational
Gender on entry to school: Coeducational
NC Year Start Date (dd/mm): 1 / 9

2. Add or amend the school details, selecting from the drop-down lists where applicable.

   > *NOTE: The **School Name**, **LA** number, **Establishment Number**, **School Phase** and **Curriculum Years** were set up when SIMS was installed. If any of these details are incorrect, please contact your Local Support Unit for assistance.*

3. Ensure that the establishment's six digit **Unique Reference Number** (URN) is entered. The number is available via the Get information about schools website (https://get-information-schools.service.gov.uk/), which is a register of schools and colleges in England.
4. Click the **Save** button, then click the **OK** button to return to the **Census Return Details** page, where the updated details are displayed.

Information for Academies

Academies should also ensure that the following information is recorded, if applicable:

- The **School Type** and **School Governance**.

  Select **Academies** from the applicable drop-down lists.
- The **Previous Name** and **Date Name Changed**.
- The **Previous Estab Number** and **Earliest DOA** (date of admission).

  This information is used by School Census. If the establishment number (DfE number) has changed for sponsor-led Academies, historical information is not collected, and the earliest date of admission is reported in the School Census.
- The **Previous URN Number** (used by other census returns) and **Date Number Changed**.

  This information is used by the School Workforce Census. For all types of Academies opened in the collection period, the date that the establishment's URN changed is used to determine when the academy was formed. Historical information is not collected from before the date the URN changed.

Editing School Childcare Details

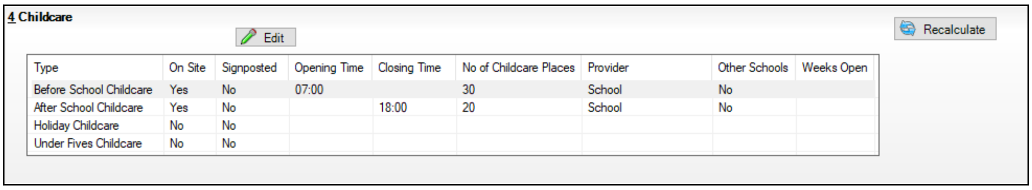
School childcare details are collected annually in the School Census Summer return.

Details can be entered via **Focus | School | School Details**, enabling the information to be maintained at any time throughout the year.

The **Childcare** panel (on the **Census Return Details** page) displays read-only childcare provision information that has been entered previously via School Details. Additional information can be added or existing data edited by clicking the **Edit** button. This provides a direct link to the **School Details** page.

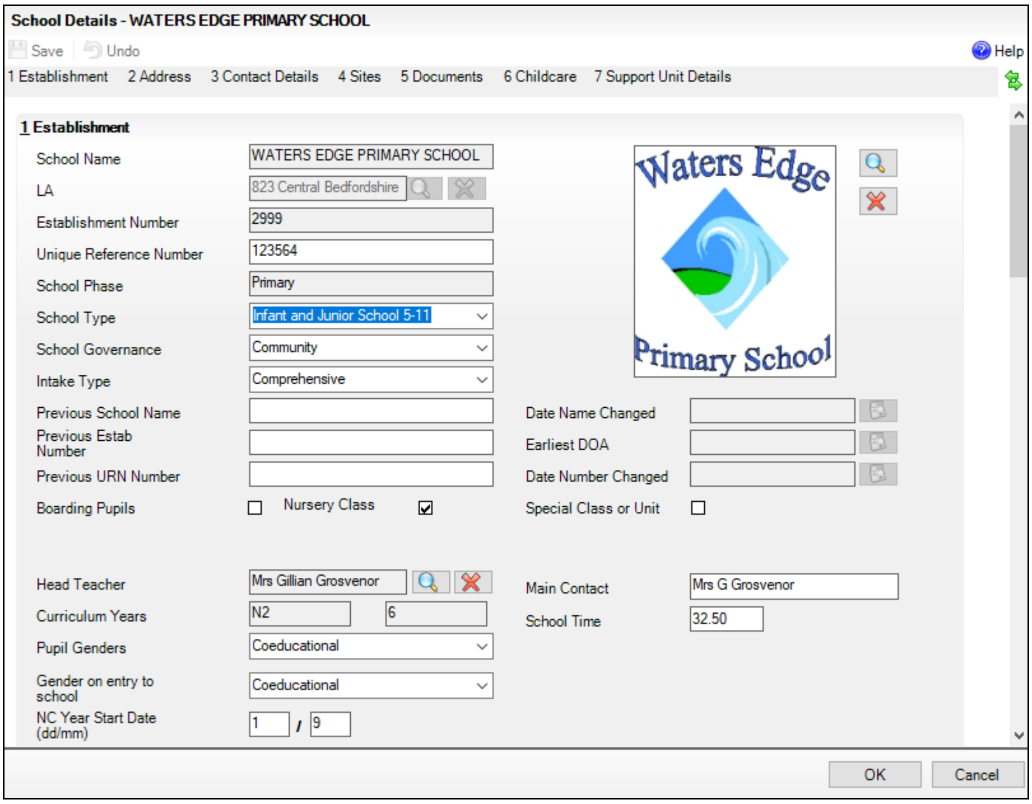
If no childcare information is recorded, a validation error is triggered when the return is run.

Calculated childcare information can be edited, if required.


4 Childcare
Edit
Recalculate

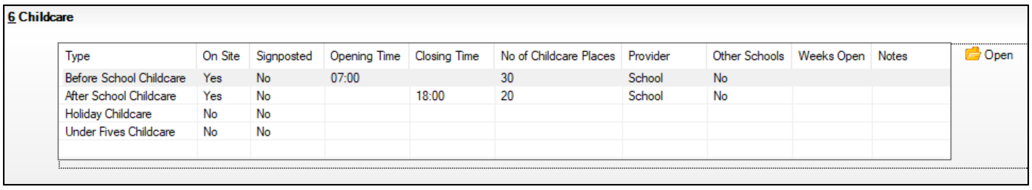
Type	On Site	Signposted	Opening Time	Closing Time	No of Childcare Places	Provider	Other Schools	Weeks Open
Before School Childcare	Yes	No	07:00		30	School	No	
After School Childcare	Yes	No		18:00	20	School	No	
Holiday Childcare	No	No						
Under Fives Childcare	No	No						

1. Click the **Edit** button in the **Childcare** panel to display the **School Details** page.


School Details - WATERS EDGE PRIMARY SCHOOL
Save
Undo
Help
1 Establishment
2 Address
3 Contact Details
4 Sites
5 Documents
6 Childcare
7 Support Unit Details
1 Establishment
Waters Edge
Primary School
OK
Cancel

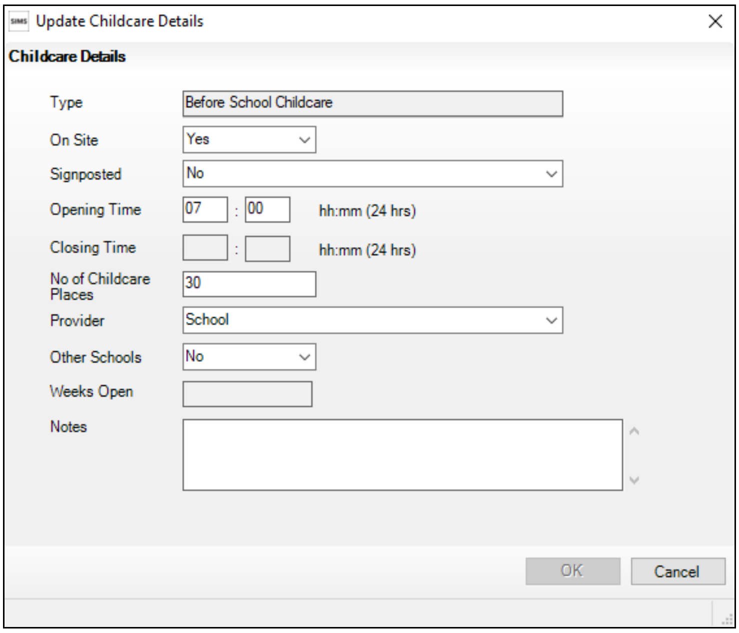
School Name: WATERS EDGE PRIMARY SCHOOL
LA: 823 Central Bedfordshire
Establishment Number: 2999
Unique Reference Number: 123564
School Phase: Primary
School Type: Infant and Junior School 5-11
School Governance: Community
Intake Type: Comprehensive
Previous School Name:
Previous Estab Number:
Previous URN Number:
Date Name Changed:
Earliest DOA:
Date Number Changed:
Boarding Pupils ☐ Nursery Class ☑
Special Class or Unit ☐
Head Teacher: Mrs Gillian Grosvenor
Main Contact: Mrs G Grosvenor
Curriculum Years: N2 6
School Time: 32.50
Pupil Genders: Coeducational
Gender on entry to school: Coeducational
NC Year Start Date (dd/mm): 1 / 9

2. Click the **Childcare** hyperlink to display the **Childcare** panel, where the current childcare details are displayed.


6 Childcare
Open

Type	On Site	Signposted	Opening Time	Closing Time	No of Childcare Places	Provider	Other Schools	Weeks Open	Notes
Before School Childcare	Yes	No	07:00		30	School	No		
After School Childcare	Yes	No		18:00	20	School	No		
Holiday Childcare	No	No							
Under Fives Childcare	No	No							

3. Double-click one of the four existing records to display the **Update Childcare Details** dialog. Alternatively, highlight a record then click the **Open** button.



Type: Before School Childcare
On Site: Yes
Signposted: No
Opening Time: 07 : 00 hh:mm (24 hrs)
Closing Time: : hh:mm (24 hrs)
No of Childcare Places: 30
Provider: School
Other Schools: No
Weeks Open:
Notes:

4. Enter the required details.
   - **Type** - based on the record you have opened, the type of childcare being provided is displayed automatically. The four types of childcare collected for the return are:
     - **Before School Childcare**
     - **After School Childcare**
     - **Holiday Childcare**
     - **Under Fives Childcare**.
   - **On Site** - select the applicable option from the drop-down list:
     - **Yes** - select this option if childcare is being provided on the school premises.
     - **No** - select this option if childcare is undertaken off the school premises, i.e. your school promotes or points parents towards a regular off-site childcare service, e.g. a private or voluntary organisation.
   - **Signposted** - one of the following options must always be selected from the drop-down list:
     - **Yes, formal arrangements including transport** - select this option if your school has formal arrangements with another provider that provides childcare for your pupils, including transport to their site.
     - **Yes, list of providers that pick up from school** - select this option if a list of local providers that will pick up pupils from the school to help parents is provided.
     - **No**

    - **Not Known**.
  - **Opening Time** - enter the time that the service becomes available (not applicable to after school care).

    NOTE: Ensure that the time is entered in 24 hour format. A colon should be entered between the hours and the minutes, e.g. 07:00.

  - **Closing Time** - enter the time that the service closed (not applicable to before school care).

    NOTE: Ensure that the time is entered in 24 hour format. A colon should be entered between the hours and the minutes, e.g. 17:30.

  - **Number of Childcare Places** - enter the maximum number of childcare places that the service can provide.
  - **Provider** - select the description from the drop-down list that most accurately describes the provider of the service:
    - **School**
    - **School in Partnership** (with another provider)
    - **Other (non-school) Provider**.
  - **Other Schools** - is the service made available to children from other schools? Select as applicable from the drop-down list:
    - **Yes**
    - **No**
    - **Unknown**.
  - **Weeks Open** - enter the number of weeks for which childcare is provided (applicable to holiday and under-fives childcare only).
  - **Notes** - notes can be added and then edited later, if required.

5. Click the **OK** button to return to the **School Details** page.
6. Click the **Save** button and then the **OK** button to return to the **Census Return Details** page.

Managing Early Years Data

Applicable to schools with Early Years children only

The early years data collected in the School Census is used to determine the amount of the dedicated schools grant (DSG) allocation provided to local authorities to fund their early years providers.

More information about the early years national funding formula (allocations and guidance) is available on the GOV.UK website (https://www.gov.uk/education/early-years-funding).

The **Early Years** panel consists of three grids:

- **Early Years**
- **Early Years Pupil Premium Receipt**
- **2 Year Old Basis for Funding**.

Editing Early Years

Early Years data is collected from all schools that have early years pupils on-roll on census day. The following items are collected:

- Hours at Setting
- Funded Hours
- Disability Access Fund
- 30 Hour Code
- Extended Funded Hours.

NOTE: Disability Access Fund, 30 Hour Code and Extended Funded Hours are not collected in the census for pupils aged two at 31/03/2023.

Funded Hours and Hours at Setting

Funded universal free entitlement hours are the total number of free childcare hours that a child receives. All three and four year old pupils are eligible for 15 hours funded childcare a week. Advice about the eligibility of two year old children for funded childcare can be found on the DfE website (https://www.gov.uk/help-with-childcare-costs/free-childcare-2-year-olds).

Hours at Setting include funded free entitlement hours (as described previously) plus any additional hours funded by other means.

The hours collected in this return are for the week in which the census day falls.

Date of Birth Ranges	School Type and National Curriculum Year Group	Funded Universal Free Entitlement Hours Maximum Entitlement
01/09/2018 to 31/03/2023 inclusive	All relevant schools and year groups.	15 hours
01/04/2018 to 31/08/2018 inclusive	For pupils in National Curriculum Year groups E1, E2, N1 and N2 only.	15 hours

Disability Access Fund

The Disability Access Fund (DAF) is payable as a lump sum once a year and awarded to three and four year old pupils who meet the following criteria:

- They are in receipt of child Disability Living Allowance (DLA)

  and
- They access their entitlement to free early learning and childcare, e.g. funded hours.

Disability Access Fund data is collected in this return for pupils who are in receipt of the fund on census day.

Date of Birth Ranges	School Type and National Curriculum Year Group
01/09/2018 to 31/03/2020 inclusive	All relevant schools and year groups.
01/04/2018 to 31/08/2018 inclusive	For pupils in National Curriculum Year groups E1, E2, N1 and N2 only.

Additional information about the Disability Access Fund is available via the DfE website (https://www.gov.uk/education/early-years-funding).

Extended Funded Hours and 30 Hour Code

Extended Funded Hours are the number of hours that a child can receive in addition to the initial 15 funded hours. Extended Funded Hours are applicable to three and four year old pupils only.

Extended Funded Hours can double the original 15 hours of free childcare to 30 hours a week, i.e. 15 funded free entitlement hours + 15 extended entitlement hours = 30 hours, provided that the following criteria are met:

- Both parents must be working (or the sole parent is working in a lone parent family) and live in England.
- Each parent earns, on average, a weekly minimum equivalent to 16 hours at National Minimum Wage or National Living Wage.
- Each parent must have an annual income of less than the specified amount.

Parents who meet the extended funded hours criteria must obtain a unique code from the Tax Office (HM Revenue & Customs), then provide it to the school, together with other details, to confirm their eligibility for extended childcare hours.

The 11-digit **30 Hour Code** and the number of extended funded hours are collected in this return for the week in which the census day falls.

Date of Birth Ranges	School Type and National Curriculum Year Group	Maximum Funded Universal Free Entitlement and Extended Free Entitlement Hours
01/09/2018 to 31/03/2023 inclusive	Applicable to all relevant schools and year groups. A valid **30 Hour Code** must be provided.	15 funded universal free entitlement hours plus 15 extended free entitlement hours equals 30 hours.
01/04/2018 to 31/08/2018 inclusive	For pupils in National Curriculum Year groups E1, E2, N1 and N2 only. A valid **30 Hour Code** must be provided.	15 funded universal free entitlement hours plus 15 extended free entitlement hours equals 30 hours.

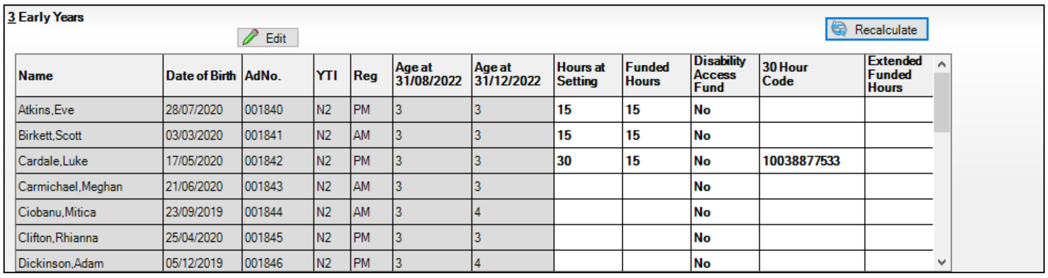
Extended Funded Hours information provided by the DfE can be found on their website (https://www.gov.uk/government/publications/30-hours-free-childcare-la-and-early-years-provider-guide).

Recording Early Years

The required data can be recorded:

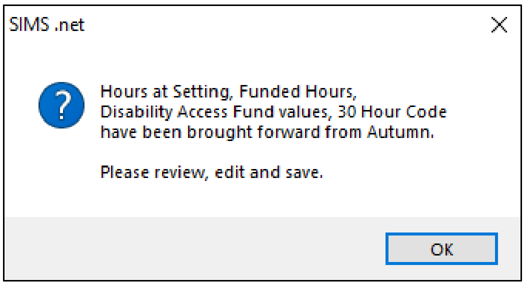
- via the **Edit** button in the **Early Years** panel
- via **Tools | Statutory Returns Tools | Update Early Years - Update Early Years** page. The data in the **Early Years** panel must be refreshed by clicking the **Recalculate** button after using the Update Early Years routine.

If data has been recorded previously, the values are displayed in the read-only **Early Years** panel. Only cohorts applicable to your school are displayed.



Name	Date of Birth	AdNo.	YTI	Reg	Age at 31/08/2022	Age at 31/12/2022	Hours at Setting	Funded Hours	Disability Access Fund	30 Hour Code	Extended Funded Hours
Atkins,Eve	28/07/2020	001840	N2	PM	3	3	15	15	No		
Birkett,Scott	03/03/2020	001841	N2	AM	3	3	15	15	No		
Cardale,Luke	17/05/2020	001842	N2	PM	3	3	30	15	No	10038877533	
Carmichael,Meghan	21/06/2020	001843	N2	AM	3	3			No		
Ciobanu,Mitica	23/09/2019	001844	N2	AM	3	4			No		
Clifton,Rhianna	25/04/2020	001845	N2	PM	3	3			No		
Dickinson,Adam	05/12/2019	001846	N2	PM	3	4			No		

1. In the **Early Years** panel, click the **Edit** button to display a message informing you that data has been brought forward from the previous census.

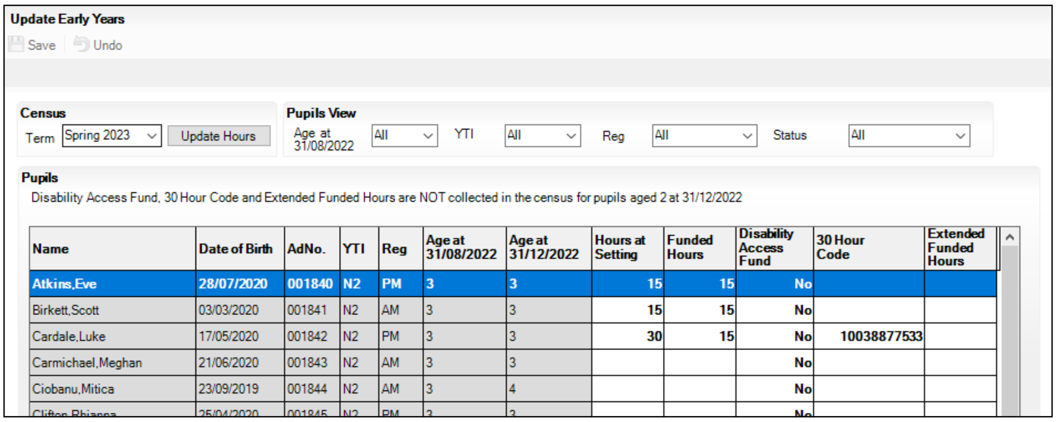


Hours at Setting, Funded Hours, Disability Access Fund values, 30 Hour Code have been brought forward from Autumn.

Please review, edit and save.

2. Click the **OK** button to display the **Update Early Years** page. By default, the current term is displayed in the **Census** panel.

*TIP: To view the data recorded for a previous term (in the current academic year), select the required **Term** from the drop-down list.*



Census

Term: Spring 2023

Pupils View

Age at 31/08/2022: All

YTI: All

Reg: All

Status: All

Pupils

Disability Access Fund, 30 Hour Code and Extended Funded Hours are NOT collected in the census for pupils aged 2 at 31/12/2022

Name	Date of Birth	AdNo.	YTI	Reg	Age at 31/08/2022	Age at 31/12/2022	Hours at Setting	Funded Hours	Disability Access Fund	30 Hour Code	Extended Funded Hours
Atkins,Eve	28/07/2020	001840	N2	PM	3	3	15	15	No		
Birkett,Scott	03/03/2020	001841	N2	AM	3	3	15	15	No		
Cardale,Luke	17/05/2020	001842	N2	PM	3	3	30	15	No	10038877533	
Carmichael,Meghan	21/06/2020	001843	N2	AM	3	3			No		
Ciobanu,Mitica	23/09/2019	001844	N2	AM	3	4			No		
Clifton,Rhianna	25/04/2020	001845	N2	PM	3	3			No		

Primary phase schools that have defined Early Years Attendance Patterns (via **Focus | Pupil | Pupil Details**) for pupils who are receiving free nursery care can update Hours at Setting automatically.

a. Click the **Update Hours** button.

   The number of Hours at Setting that the listed pupils are expected to attend during the census week (based on the early years provision times recorded as part of their attendance pattern) are displayed in the **Pupils** panel.

b. Edit the values, if required.

   NOTE: If your school does not use the Define Early Years Attendance Patterns functionality, the data can be entered in the grid manually.

3. To add or edit the number of **Hours at Setting**, **Funded Hours** and **Extended Funded Hours** for an individual pupil, select the required criteria in the **Pupils View** panel.

   In the **Pupils** panel, highlight the required pupil, click the applicable cell and then enter the required number of hours.

__IMPORTANT NOTES:__ Values for __Funded Hours__, __Hours at Setting__ and __Extended Funded Hours__ should be entered using two decimal places. For example, 1 hour 15 minutes must be entered as 1.25. Zero (0) is an accepted value.

If the value entered is within the range accepted by SIMS but is higher than what the DfE expects, a validation error is displayed when the return is created and validated. An explanation as to why the value is higher should be recorded on the COLLECT Portal.

4. If most of the pupils are receiving the same number of hours, the following method can be used to populate the column quickly:
    a. In the **Pupils View** panel, select the required year group from the Year Taught In (**YTI**) drop-down list. The selected pupils only are displayed in the **Pupils** panel.
    b. Right-click in the **Pupils** panel, then select **Select All** from the drop-down list.
    c. Click in one of the highlighted cells of the column you wish to populate, i.e. **Hours at Setting**, **Funded Hours** or **Extended Funded Hours**, then enter the number of hours that is applicable to most pupils.

       This number is then entered automatically for all the selected pupils.
    d. Click to the right of the grid to deselect all.
    e. Edit the entry for each pupil who is receiving a different number of hours. This is achieved by highlighting the required pupil, clicking the associated **Hours at Setting**, **Funded Hours** or **Extended Funded Hours** cell (as applicable) then entering the required number.
5. Indicate whether the pupils are in receipt of the **Disability Access Fund**. Click the applicable cell then select **Yes** or **No** from the drop-down list.
6. Enter the 11 digit **30 Hour Code** in the applicable cell, if in receipt of extended funded hours.

   IMPORTANT NOTE: *Each pupil must have a different 30 hour code. Ensure that all 11 digits are entered.*
7. Click the **Save** button.

   If there are any pupils for whom zero hours have been recorded, a message is displayed. Click the **Yes** button to save the data or the **No** button to return to the **Update Hours** page, where the number of hours can be entered.
8. Click the **OK** button to return to the **Census Return Details** page, where the updated hours are displayed.

IMPORTANT NOTES:
*If, while completing the return, any of the following processes are performed, click the **Recalculate** button (located at the top right-hand side of the **Early Years** panel) to ensure that the up-to-date data is displayed:*

- *any information is updated via **Tools | Statutory Return Tools | Update Early Years***
- *a new pupil is added in SIMS*
- *a pupil's date of birth is amended.*

*Please note that when information is updated via the **Edit** button, the **Early Years** panel is refreshed automatically.*

Using the Status to determine if Hours at Setting or Funded Hours are recorded

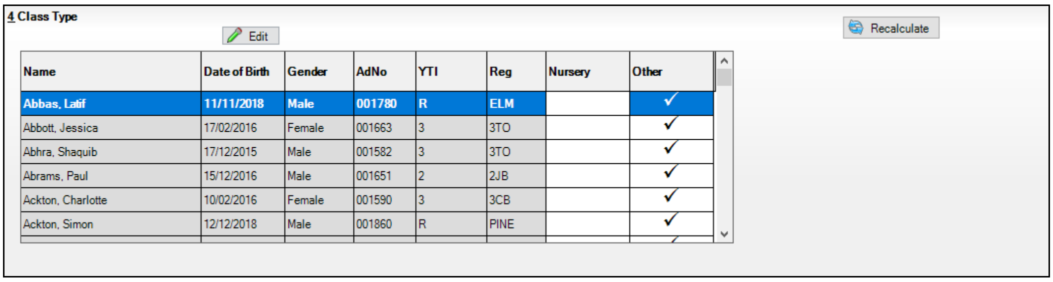
1. On the **Census Return Details** page, click the **Edit** button (located in the **Early Years** panel) to display the **Update Early Years** page.
2. In the **Pupils View** panel, ensure that the required **Age at** date, **YTI** and **Reg** group are selected and then select **No Hours at Setting** (or **No Funded Hours**) from the **Status** drop-down list.

   Only pupils who do not have an entry for **Hours at Setting** (or **Funded Hours**) are displayed.
3. Enter the required values for these pupils as described previously.
4. Click the **Save** button.

Editing Class Types

The type of class (either **Nursery** or **Other**) that each pupil belongs to on census day must be specified. Pupils in your Nursery class should be specified as **Nursery**, with all other pupils specified as **Other**.

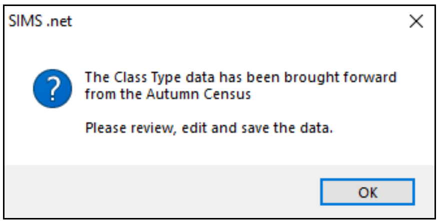
If the class types have been recorded previously via **Tools | Statutory Return Tools | Update Class Type**, the data is displayed in the **Class Type** panel.



Name	Date of Birth	Gender	AdNo	YTI	Reg	Nursery	Other
Abbas, Latif	11/11/2018	Male	001780	R	ELM		✓
Abbott, Jessica	17/02/2016	Female	001663	3	3TO		✓
Abhra, Shaquib	17/12/2015	Male	001582	3	3TO		✓
Abrams, Paul	15/12/2016	Male	001651	2	2JB		✓
Ackton, Charlotte	10/02/2016	Female	001590	3	3CB		✓
Ackton, Simon	12/12/2018	Male	001860	R	PINE		✓

The **Class Type** panel is read-only. However, you can review, edit and save class types by clicking the **Edit** button.

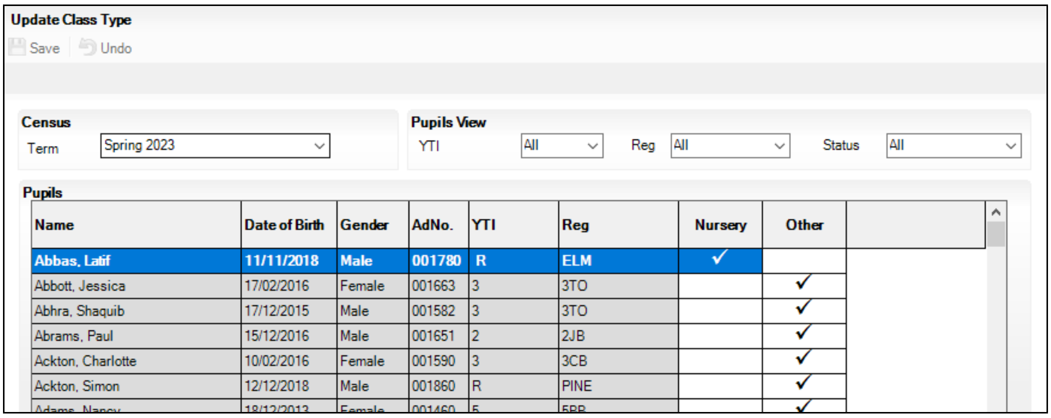
1. Click the **Edit** button. A message informs you that the class type data has been brought forward from the previous census.



The Class Type data has been brought forward from the Autumn Census

Please review, edit and save the data.

2. Click the **OK** button to display the **Update Class Type** dialog.



Term: Spring 2023

YTI: All

Reg: All

Status: All

Name	Date of Birth	Gender	AdNo.	YTI	Reg	Nursery	Other
Abbas, Latif	11/11/2018	Male	001780	R	ELM	✓	
Abbott, Jessica	17/02/2016	Female	001663	3	3TO		✓
Abhra, Shaquib	17/12/2015	Male	001582	3	3TO		✓
Abrams, Paul	15/12/2016	Male	001651	2	2JB		✓
Ackton, Charlotte	10/02/2016	Female	001590	3	3CB		✓
Ackton, Simon	12/12/2018	Male	001860	R	PINE		✓

> *NOTE: If new pupils exist the default class type is displayed as blank.*

3. To specify the class type for an individual pupil, click the appropriate cell of the **Nursery** or **Other** column to display a tick. Clicking again removes the tick.
4. If all or the majority of pupils need to be assigned the same class type, the following method can be used to quickly populate the **Nursery** and **Other** columns:
   a. Right-click the **Other** column header, then select **Check All** from the pop-up menu.
   b. In the **Pupils View** panel, select a Nursery year from the year taught in (**YTI**) drop-down list.

      The selected pupils only are displayed in the **Pupils** panel.
   c. Right-click the **Nursery** column header then select **Check All** from the pop-up menu.
   d. Repeat steps *b* and *c* for any additional Nursery year.
   e. To ensure that your selection is correct, select **All** from the Year Taught In (**YTI**) drop-down list, then check the data displayed.
5. Click the **Save** button.
6. If a message is displayed advising you that some pupils have not been assigned a class type, click the **No** button then ensure that a class type is allocated to every pupil before saving again.

> ***IMPORTANT NOTE:*** *To prevent validation failures when the School Census file is created, every pupil must be assigned a class type.*

7. Click the **OK** button to return to the **Census Return Details** page, where the updated class types are displayed in the **Class Type** panel.

Additional Resources:

Preparing for the School Census Summer 2023 Return guide

Resetting All Class Types

To reset all class types (via the **Update Class Type** page), right-click the **Nursery** (or **Other**) column header, then select **Remove All** from the pop-up list. The **Nursery** (or **Other**) column is cleared of all ticks.

Re-enter the correct class types for all pupils as previously described.

Identifying which Pupils have no Class Type Specified

To ensure that all pupils are assigned to a class type (via the **Update Class Type** page), select **No Class Type** from the **Status** drop-down list in the **Pupils View** panel. Any pupils without a **Class Type** are displayed in the **Pupils** panel.

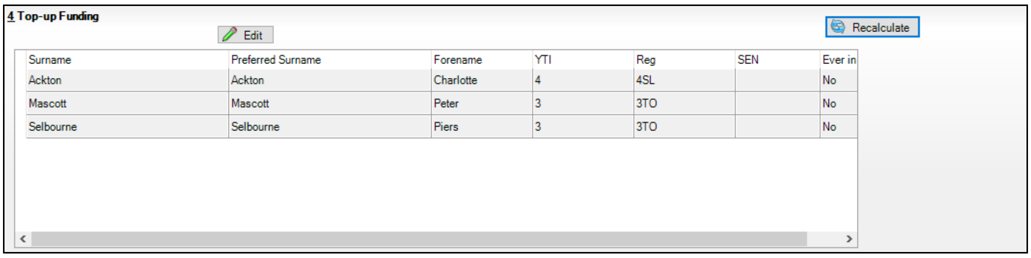
Specify a class type for these pupils, as previously described.

Editing Pupils with Top-Up Funding

Top-up funding is supplied to schools, in most cases by the Local Authority, to meet the additional costs of support for high needs pupils.

The **Top-up Funding** panel enables you to record the on-roll pupils for whom your school is receiving top-up funding on census day.

If the pupils with top-up funding have been recorded previously via **Tools | Statutory Return Tools | Update Top-Up Funding**, the data is displayed in the **Top-up Funding** panel.

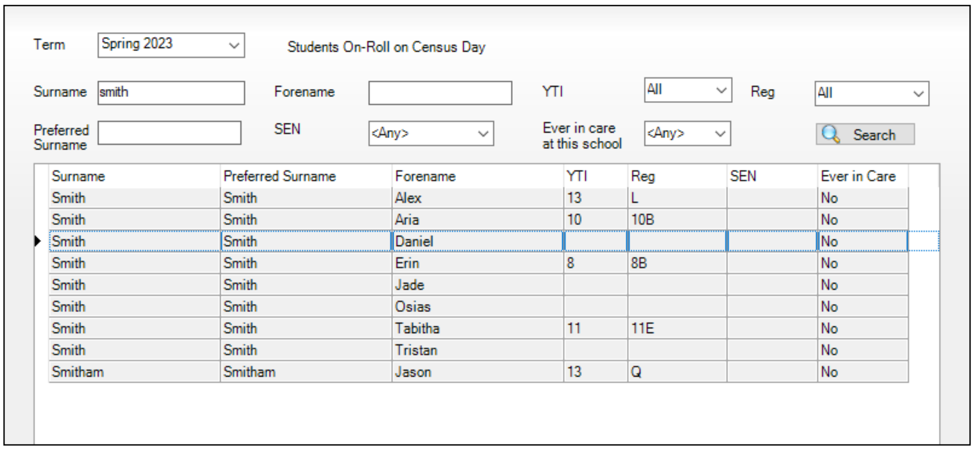


Surname	Preferred Surname	Forename	YTI	Reg	SEN	Ever in
Ackton	Ackton	Charlotte	4	4SL		No
Mascott	Mascott	Peter	3	3TO		No
Selbourne	Selbourne	Piers	3	3TO		No

The information displayed in the **Top-up Funding** panel is read-only. Updating top-up funding information, e.g. adding or removing a pupil, must be done via the **Edit** button.

1. Click the **Edit** button to display the **Update Pupils with Top-up Funding** dialog. The pupils currently recorded as having top-up funding are displayed in the **Top-up Funding** list (located in the bottom half of the page).
2. Use the **Students On-Roll on Census Day** search criteria to locate the additional pupils you wish to record as having top-up funding.

*TIP: Click the **Search** button to display a list of all pupils who have not been defined as having top-up funding. Alternatively, enter all or part of the required search criteria then click the **Search** button.*

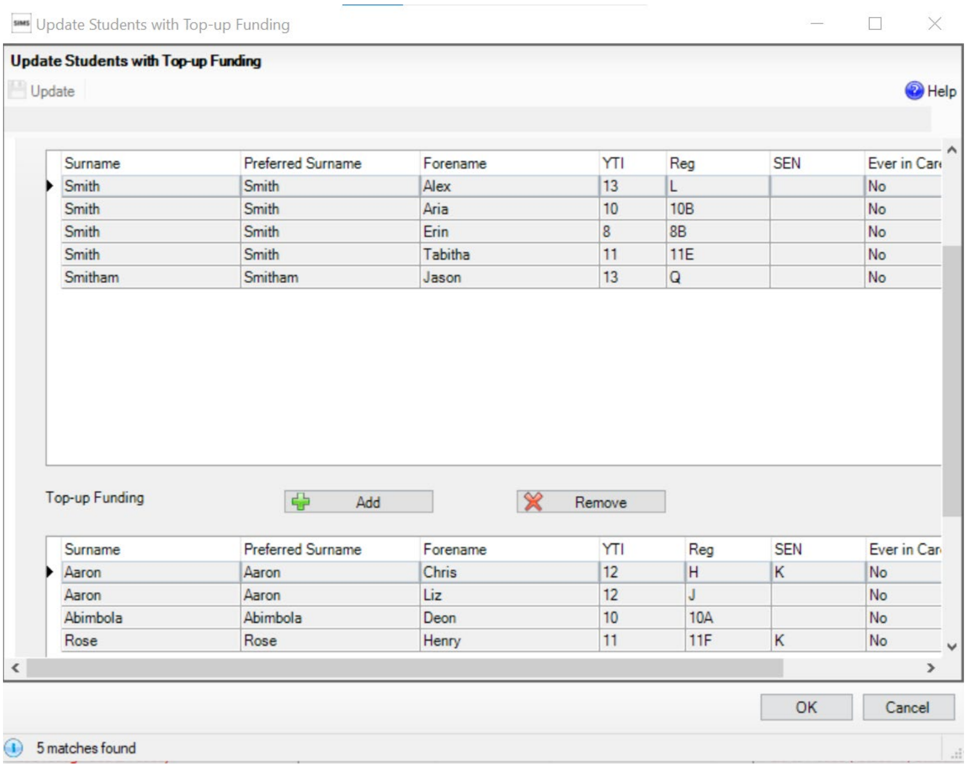

Students On-Roll on Census Day
Search

Term: Spring 2023
Surname: smith
Forename:
YTI: All
Reg: All
Preferred Surname:
SEN: <Any>
Ever in care at this school: <Any>

Surname	Preferred Surname	Forename	YTI	Reg	SEN	Ever in Care
Smith	Smith	Alex	13	L		No
Smith	Smith	Aria	10	10B		No
Smith	Smith	Daniel				No
Smith	Smith	Erin	8	8B		No
Smith	Smith	Jade				No
Smith	Smith	Osias				No
Smith	Smith	Tabitha	11	11E		No
Smith	Smith	Tristan				No
Smitham	Smitham	Jason	13	Q		No

3. Highlight the pupil(s) who you want to record as having top-up funding, then click the **Add** button to move the selected pupil(s) to the **Top-up Funding** list.

   One or more pupils can be selected using the **Ctrl**+**click** or **Shift**+**click** functionality.


Update Students with Top-up Funding
Update Students with Top-up Funding
Update
Help
Top-up Funding
Add
Remove
OK
Cancel

Surname	Preferred Surname	Forename	YTI	Reg	SEN	Ever in Car
Smith	Smith	Alex	13	L		No
Smith	Smith	Aria	10	10B		No
Smith	Smith	Erin	8	8B		No
Smith	Smith	Tabitha	11	11E		No
Smitham	Smitham	Jason	13	Q		No

Top-up Funding

Surname	Preferred Surname	Forename	YTI	Reg	SEN	Ever in Car
Aaron	Aaron	Chris	12	H	K	No
Aaron	Aaron	Liz	12	J		No
Abimbola	Abimbola	Deon	10	10A		No
Rose	Rose	Henry	11	11F	K	No

5 matches found

4. To remove a pupil from the **Top-up Funding** list, highlight the required pupil, then click the **Remove** button. The pupil's record is moved to the **Students On-Roll on Census Day** list, from where it can be reselected, if required.
5. Click the **Update** button to save the data and arrange the list of pupils in **Surname** order.

6. Click the **OK** button located at the bottom right-hand side of the screen to return to the **Census Return Details** page, where the updated information is displayed in the **Top-up Funding** panel.

Additional Resources:

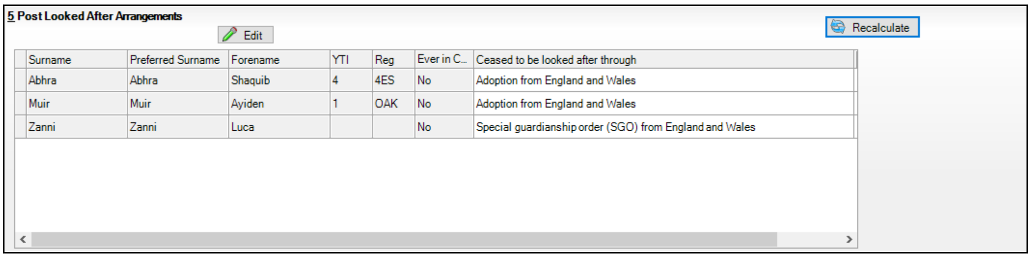
Preparing for the School Census Summer 2023 Return guide

Editing Pupil Post Looked After Arrangements

The Post Looked After Arrangements routine provides schools with the ability to record whether pupils who are on-roll on census day were looked after immediately before adoption or prior to being the subject of a residence or special guardianship order.

If the pupils with post looked after arrangements (PLAA) have been recorded previously via **Tools | Statutory Return Tools | Update Post Looked After Arrangements**, the data is displayed in the **Post Looked After Arrangements** panel.

1. Click the **Recalculate** button (in the **Post Looked After Arrangements** panel) to ensure that all pupils who already have a PLAA status are displayed.

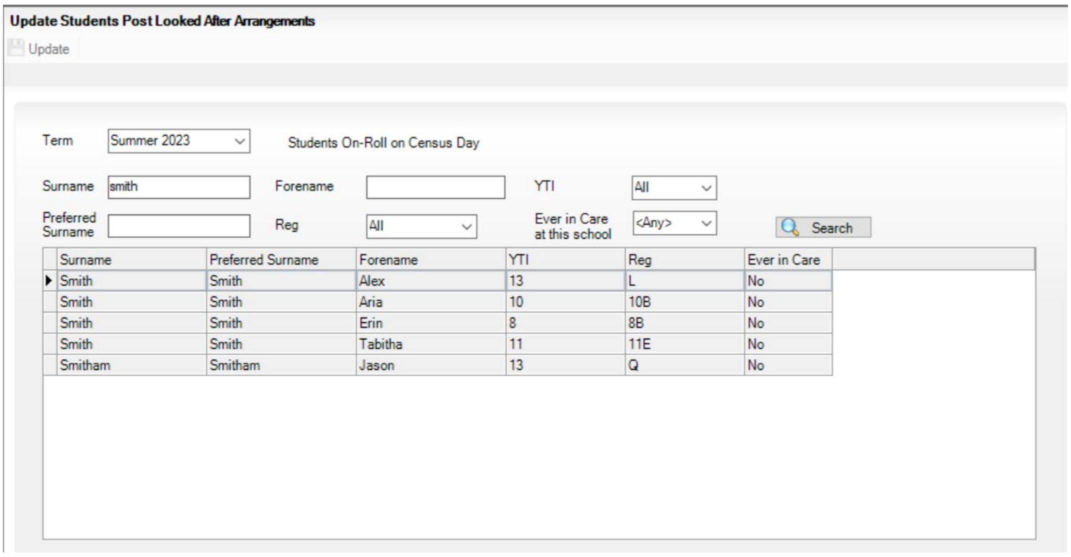


Surname	Preferred Surname	Forename	YTI	Reg	Ever in C...	Ceased to be looked after through
Abhra	Abhra	Shaquib	4	4ES	No	Adoption from England and Wales
Muir	Muir	Ayiden	1	OAK	No	Adoption from England and Wales
Zanni	Zanni	Luca			No	Special guardianship order (SGO) from England and Wales

The information displayed in the **Post Looked After Arrangements** panel is read-only. Updating the information, e.g. editing the PLAA status or adding a pupil, must be done via the **Edit** button.

2. Click the **Edit** button to display the **Update Pupils Post Looked After Arrangements** page. Any pupils currently recorded as having PLAA are displayed in the **Post Looked After Arrangements** list located in the bottom half of the page.
3. Use the **Students On-Roll on Census Day** search criteria to locate the additional pupils you wish to record as having PLAA.

> *TIP: Click the **Search** button to display a list of pupils who have not been defined as having PLAA. Alternatively, enter all or part of the required search criteria then click the **Search** button.*



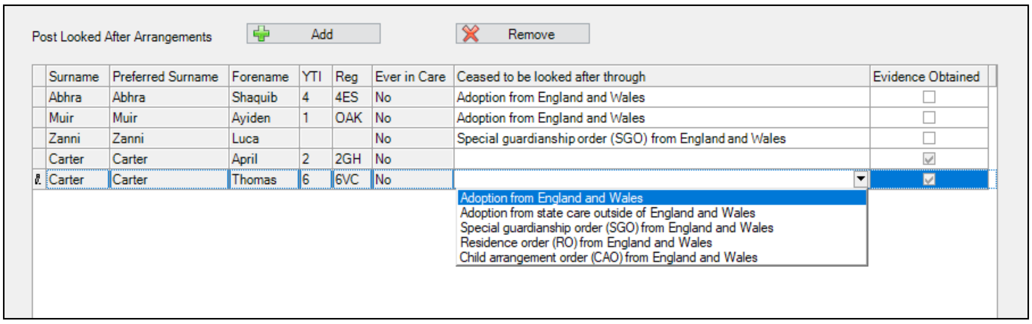
Term: Summer 2023 — Students On-Roll on Census Day

Surname: smith
Forename:
YTI: All
Preferred Surname:
Reg: All
Ever in Care at this school: <Any>

Surname	Preferred Surname	Forename	YTI	Reg	Ever in Care
Smith	Smith	Alex	13	L	No
Smith	Smith	Aria	10	10B	No
Smith	Smith	Erin	8	8B	No
Smith	Smith	Tabitha	11	11E	No
Smitham	Smitham	Jason	13	Q	No

4. Highlight the pupils who you want to record as having PLAA, then click the **Add** button to move the selected pupils automatically to the **Post Looked After Arrangements** list.

   One or more pupils can be selected using the **Ctrl+click** or **Shift+click** functionality.



Surname	Preferred Surname	Forename	YTI	Reg	Ever in Care	Ceased to be looked after through	Evidence Obtained
Abhra	Abhra	Shaquib	4	4ES	No	Adoption from England and Wales	☐
Muir	Muir	Ayiden	1	OAK	No	Adoption from England and Wales	☐
Zanni	Zanni	Luca			No	Special guardianship order (SGO) from England and Wales	☐
Carter	Carter	April	2	2GH	No		☑
Carter	Carter	Thomas	6	6VC	No		☑

Adoption from England and Wales
Adoption from state care outside of England and Wales
Special guardianship order (SGO) from England and Wales
Residence order (RO) from England and Wales
Child arrangement order (CAO) from England and Wales

5. For each pupil added to the **Post Looked After Arrangements** list, select the post looked after arrangement status by clicking in the applicable cell in the **Ceased to be looked after through** column, then selecting the required status from the drop-down list:
   - Adoption from England and Wales
   - Adoption from state care outside of England and Wales
   - Special guardianship order (SGO) from England and Wales
   - Residence order (RO) from England and Wales
   - Child arrangement order (CAO) from England and Wales.
6. Select the **Evidence Obtained** check box if documents have been obtained that provide evidence of the post looked after arrangements.

If you indicate that evidence has been obtained, ensure that the applicable documents are stored securely either outside of SIMS or within the Document Management Server.

> *NOTE: **Evidence Obtained** is not collected in the School Census return but should be recorded as proof of DfE/Ofsted compliance.*

7. To remove a name from the list, highlight it then click the **Remove** button. The record is moved to the **Students On-Roll on Census Day** list, from where it can be reselected, if required.
8. Click the **Update** button to save the information and arrange the list of pupils in surname order.

   If you have indicated that evidence has been obtained, you are reminded to ensure that the necessary documents are stored securely outside of SIMS or within the Document Management Server.
9. Click the **OK** button to continue.
10. Click the **OK** button (located at the bottom right-hand side of the screen) to return to the **Census Return Details** page, where the updated information is displayed in the **Post Looked After Arrangements** panel.

Additional Resources:

Preparing for the School Census Summer 2023 Return guide

More Information:

Post Looked After Arrangements Report on page *50*

Updating Funding and Monitoring

Not applicable to Nursery schools

The pupil level Update Funding and Monitoring functionality is provided to enable schools to record aspects of the Education Recovery Package.

From the start of the academic year 2022/2023 (the 1 August is the earliest possible date), schools should record tutoring that was delivered via any of the following National Tutoring Programme (NTP) delivery routes:

- tuition partners
- academic mentors
- school-led tutoring.

In the previous academic year school-led tutoring only was collected.

More information about the National Tutoring Programme is available on the GOV.UK website https://www.gov.uk/government/publications/national-tutoring-programme-ntp.

The information can be recorded via the **Tools** menu and maintained at any time during the academic year.

The information required is based on individual pupils:

Pupil in receipt of tutoring programme: Applicable to all schools (except Nursery schools), with the appropriate year groups or age groups, i.e. pre-16. For pupils in National Curriculum Year Actual 1 to 11, or aged 5 to 15 as at 31/08/2022 in National Curriculum Year Actual 'X' for special schools. (Funding and Monitoring code = **01**.)

Detailed guidance about the expectations and conditions attached to tutoring funding is available on the GOV.UK.

What Data should be entered?

*NOTE: Before entering tutoring hours, ensure that **Tutoring** is selected for applicable pupils only. When a tick is displayed, values can be entered in the corresponding 'cumulative hour' cells.*

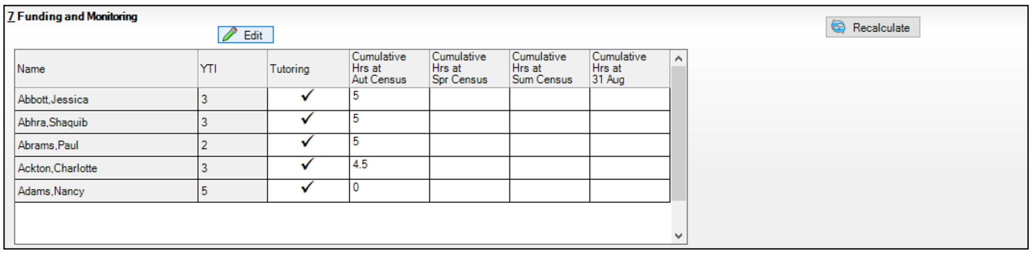
The following table describes the values that should be entered in each 'hours' column.

	Cumulative Hrs at Aut Census	**Cumulative Hrs at Spr Census**	**Cumulative Hrs at Sum Census**	**Cumulative Hrs at 31 Aug**
Description of expected values	All hours of tutoring from the start of the Autumn term to the Autumn census date (06/10/2022).	All hours of tutoring from the start of the Autumn term to the Spring census date (19/01/2023). The number of hours entered must be greater than or equal to the Autumn hours.	All hours of tutoring from the start of the Autumn term to the Summer census date (18/05/2023). The number of hours entered must be greater than or equal to the Spring hours.	All hours of tutoring from the start of the Autumn term to the Summer census date plus any additional hours that occurred after the Summer census date. The number of hours entered must be greater than or equal to the Summer hours.
Scenario	Five hours tuition received from 01/08/2022 to 06/10/2022.	Three hours received after 06/10/2022 to 19/01/2023.	Two hours received after 19/01/2023 to 18/05/2023.	One additional hour after 18/05/2023 to 31/07/2023. Not applicable to the census but required for ESFA reporting.
Example values for each column	5	8	10	11

A red 'cumulative hours' cell indicates that the value entered has failed the validation. A message providing more details is displayed in the status bar at the bottom of the **Update Funding and Monitoring** page.

Editing Funding and Monitoring

If funding and monitoring details have been recorded previously via **Tools | Statutory Return Tools | Update Funding and Monitoring**, the information is displayed in the **Funding and Monitoring** panel.

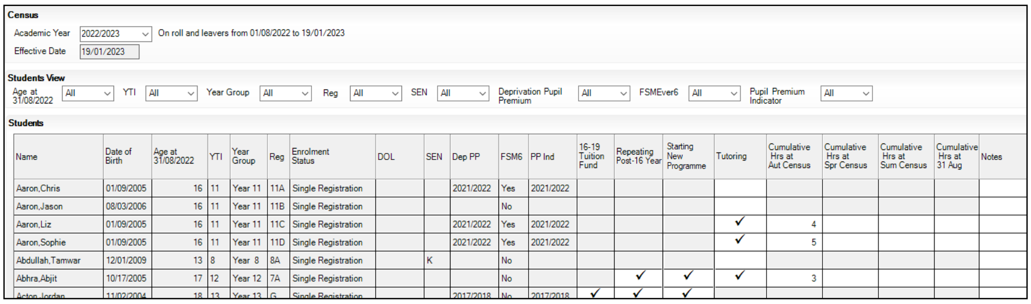


7 Funding and Monitoring

Name	YTI	Tutoring	Cumulative Hrs at Aut Census	Cumulative Hrs at Spr Census	Cumulative Hrs at Sum Census	Cumulative Hrs at 31 Aug
Abbott,Jessica	3	✓	5			
Abhra,Shaquib	3	✓	5			
Abrams,Paul	2	✓	5			
Ackton,Charlotte	3	✓	4.5			
Adams,Nancy	5	✓	0			

> *NOTE: Only pupils with funding and monitoring information are displayed in the **Funding and Monitoring** panel.*

1. Click the **Recalculate** button (in the **Funding and Monitoring** panel) to ensure that the latest details are displayed.
2. If you wish to update the information, click the **Edit** button to display the **Update Funding and Monitoring** page.



Census

Academic Year: 2022/2023 On roll and leavers from 01/08/2022 to 19/01/2023
Effective Date: 19/01/2023

Students View

Age at 31/08/2022: All
YTI: All
Year Group: All
Reg: All
SEN: All
Deprivation Pupil Premium: All
FSMEver6: All
Pupil Premium Indicator: All

Students

Name	Date of Birth	Age at 31/08/2022	YTI	Year Group	Reg	Enrolment Status	DOL	SEN	Dep PP	FSM6	PP Ind	16-19 Tuition Fund	Repeating Post-16 Year	Starting New Programme	Tutoring	Cumulative Hrs at Aut Census	Cumulative Hrs at Spr Census	Cumulative Hrs at Sum Census	Cumulative Hrs at 31 Aug	Notes
Aaron,Chris	01/09/2005	16	11	Year 11	11A	Single Registration			2021/2022	Yes	2021/2022									
Aaron,Jason	08/03/2006	16	11	Year 11	11B	Single Registration				No										
Aaron,Liz	01/09/2005	16	11	Year 11	11C	Single Registration			2021/2022	Yes	2021/2022				✓	4				
Aaron,Sophie	01/09/2005	16	11	Year 11	11D	Single Registration			2021/2022	Yes	2021/2022				✓	5				
Abdullah,Tamwar	12/01/2009	13	8	Year 8	8A	Single Registration		K		No										
Abhra,Abjit	10/17/2005	17	12	Year 12	7A	Single Registration				No			✓	✓	✓	3				
Acton,Jordan	11/02/2004	18	13	Year 13	G	Single Registration			2017/2018	No	2017/2018	✓	✓	✓						

3. In the **Pupil View** panel, specify the required filters. The content of the **Pupil** panel changes to reflect the options selected.

   Read-only pupil information is displayed in the columns on the left-hand side of the **Pupil** panel. This information is shown as at the system date.

   Cells with a white background are editable.
4. Right-click anywhere in the **Tutoring** column, then select the required option from the pop-up menu.
   a. If most or all of the pupils have been receiving tutoring, select the **Check All** option.
   b. Any pupils who have not been receiving tutoring can then be deselected by clicking the **Tuition** cell adjacent to their name.
5. When a tick is entered in a **Tutoring** cell, the corresponding ‘cumulative hour’ cells are then editable. The number of tutoring hours (to the nearest 0.5) that the pupil has received as at the applicable census date should be entered.

   After entering a value in the **Cumulative Hrs at Aut Census** column it is possible to auto-populate the ‘hours’ cells to the right. The associated Summer cell turns red.

   These values can be edited when you know the hours that have been delivered for Summer.

> ***IMPORTANT NOTE:*** *To deselect tutoring, all of the existing hours must be removed for the selected pupil(s). Clicking the* ***Undo*** *button reverts the changes, if required.*
>
> *The cumulative Summer hours only are reported in the Summer census.*

6. In the **Cumulative Hrs at 31 Aug** column, enter the total number of tutoring hours for the whole academic year up until 31 August, which includes the summer holidays. The value entered must be greater than or equal to that entered in the **Cumulative Hrs at Sum Census** column.

   A red cell indicates that the value is less than that entered in the **Cumulative Hrs at Sum Census** column and must be amended.

> *NOTE: The values entered in the* ***Cumulative Hrs at 31 Aug*** *column are* *not* *reported in the census. This functionality has been provided to enable schools to record data required by the Education and Skills Funding Agency (ESFA) (https://www.gov.uk/government/publications/recovery-premium-funding/recovery-premium-funding).*

7. Enter **Notes**, if required. This information is for your school's use and is not collected in the census.
8. Click the **Save** button and then click the **OK** button to return to the **Census Return Details** page.

> *NOTE: All validation errors (red cells) must the resolved before saving the data.*

DfE guidance about Learner funding and monitoring (FAM) is available on the GOV.UK website (https://www.gov.uk/guidance/complete-the-school-census/data-items-2022-to-2023).

Managing School Dinners Taken on Census Day

Applicable to schools with pupils in Reception, Year 1 and Year 2

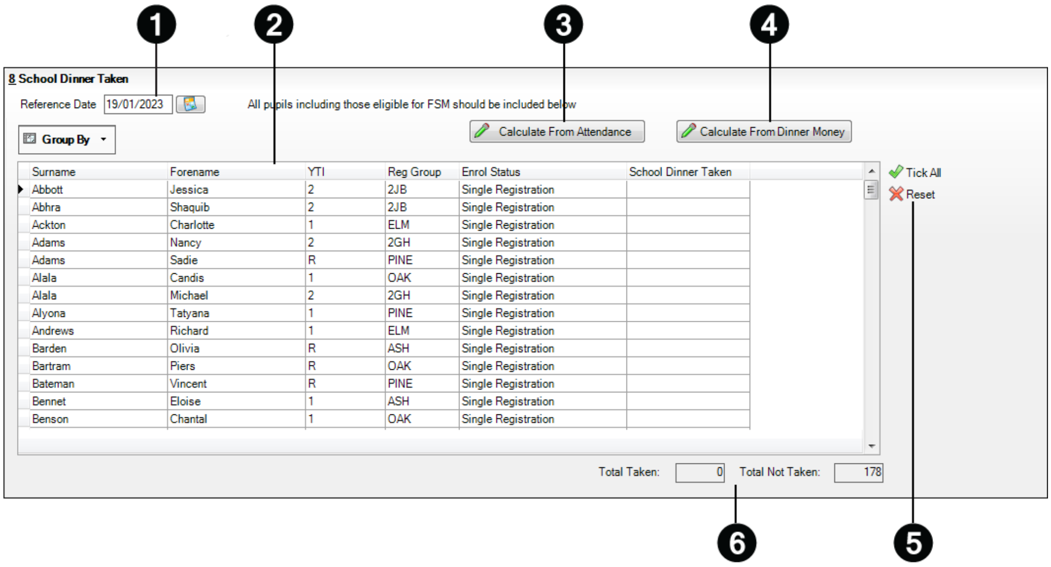
All pupils in Reception, Year 1 and Year 2 in English state-funded schools are offered a Universal Infant School Meal, i.e. a hot meal at lunchtime. This applies to Academies, Free Schools and Pupil Referral Units, as well as to schools maintained by the local authority. The School Census Summer 2023 Return collects information about pupils who receive a Universal Infant School Meal (school dinner) on census day.

The **School Dinner Taken** panel displays all pupils in Reception, Year 1 and Year 2 who are on-roll on census day. The options available in the panel enable you to record pupils who have taken a Universal Infant School Meals on census day, so that accurate data can be included in the census.

> *NOTES: The* ***Reference Date*** *is provided so that your school can report school dinners taken on an alternative date to census day, if required.*

> *The pupils listed in the **School Dinner Taken** panel are those who are on-roll on census day. Whereas the data calculated via the **Calculate From Attendance** and the **Calculate From Dinner Money** buttons is based on the reference date.*

If your school uses SIMS Dinner Money or SIMS Attendance, the number of dinners taken on census day can be calculated using the data recorded when using these modules. If either or both modules are not in use, the applicable **Calculate From** button(s), as displayed in the following graphic, are not displayed but the information can be recorded manually.



Reference Date 19/01/2023

All pupils including those eligible for FSM should be included below

Surname	Forename	YTI	Reg Group	Enrol Status	School Dinner Taken
Abbott	Jessica	2	2JB	Single Registration	
Abhra	Shaquib	2	2JB	Single Registration	
Ackton	Charlotte	1	ELM	Single Registration	
Adams	Nancy	2	2GH	Single Registration	
Adams	Sadie	R	PINE	Single Registration	
Alala	Candis	1	OAK	Single Registration	
Alala	Michael	2	2GH	Single Registration	
Alyona	Tatyana	1	PINE	Single Registration	
Andrews	Richard	1	ELM	Single Registration	
Barden	Olivia	R	ASH	Single Registration	
Bartram	Piers	R	OAK	Single Registration	
Bateman	Vincent	R	PINE	Single Registration	
Bennet	Eloise	1	ASH	Single Registration	
Benson	Chantal	1	OAK	Single Registration	

Total Taken: 0 Total Not Taken: 178

❶	By default, the **Reference Date** is set to 18/05/2023 (census day). If, due to exceptional circumstance, e.g. flooding, pupils were unable to take a school dinner on census day, the reference date can be changed to a date that reflects the situation. However, the reference date must be within the Summer term date range.
❷	Click the required column header to sort the data.
❸	The **Calculate From Attendance** button is displayed only if SIMS Attendance is in use.
❹	The **Calculate from Dinner Money** button is displayed only if SIMS Dinner Money is in use.
❺	When the **Reset** button is clicked all existing ticks are removed from the **School Dinner Taken** column enabling you to start the process again.
❻	The **Total Taken** and **Total Not Taken** provide an indication of whether the number of school dinners taken is correct or whether edits are required.

After the return has been created and validated, the School Dinner Taken detail report can be run to assist with the checking of results.

More Information:
School Dinner Taken Report on page *49*

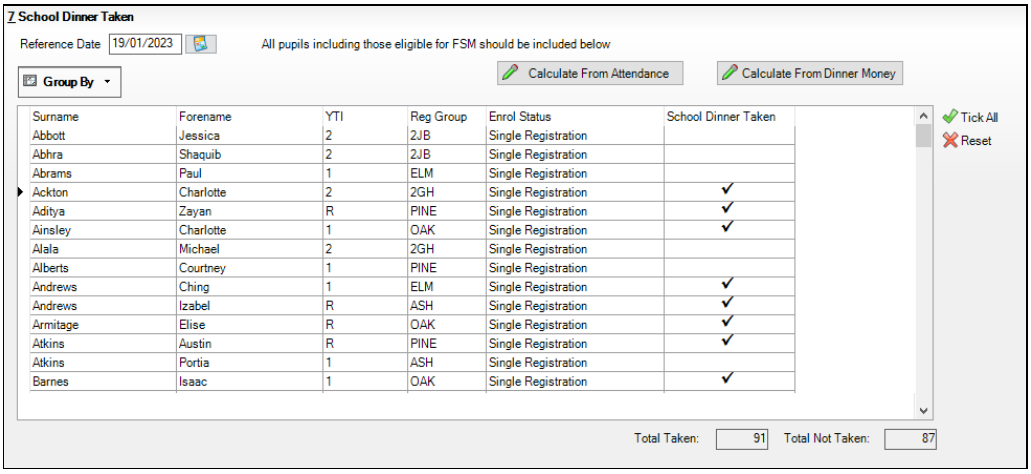
Using Dinner Money to Calculate School Dinners Taken on Census Day

If SIMS Dinner Money is in use, the Dinner Money data recorded for census day can be used to calculate the number of school dinners taken on census day.

Many users of SIMS Dinner Money also use SIMS Attendance. If this is the case the **Calculate From Attendance** button is also displayed.

However, it is recommended that the Calculate From Dinner Money routine is used in the first instance. This is because the Calculate From Attendance routine looks at all pupils with a present or late attendance mark on census day morning. These pupils could be taking any sort of meal on census day, e.g. going home for lunch, pack lunch brought from home, as well as meals provided by the school. The School Census return is only interested in school meals provided by the school.

SIMS Dinner Money takes into account these different meal types and populates the **School Dinner Taken** column with ticks where meals provided by the school only have been taken.



Reference Date 19/01/2023

All pupils including those eligible for FSM should be included below

Surname	Forename	YTI	Reg Group	Enrol Status	School Dinner Taken
Abbott	Jessica	2	2JB	Single Registration	
Abhra	Shaquib	2	2JB	Single Registration	
Abrams	Paul	1	ELM	Single Registration	
Ackton	Charlotte	2	2GH	Single Registration	✓
Aditya	Zayan	R	PINE	Single Registration	✓
Ainsley	Charlotte	1	OAK	Single Registration	✓
Alala	Michael	2	2GH	Single Registration	
Alberts	Courtney	1	PINE	Single Registration	
Andrews	Ching	1	ELM	Single Registration	✓
Andrews	Izabel	R	ASH	Single Registration	✓
Armitage	Elise	R	OAK	Single Registration	✓
Atkins	Austin	R	PINE	Single Registration	✓
Atkins	Portia	1	ASH	Single Registration	
Barnes	Isaac	1	OAK	Single Registration	✓

Total Taken: 91 Total Not Taken: 87

1. Click the **Calculate From Dinner Money** button.

> ***WARNING:*** *Clicking the **Calculate From Dinner Money** button overwrites all existing data in the **School Dinner Taken** panel.*

If SIMS detects missing information, the following message is displayed:

Dinner Money information is incomplete. Please ensure that meals are recorded in Dinner Money.

2. Click the **Cancel** button to return to SIMS where the missing information can be entered or the **OK** button to continue.

A tick is entered against each pupil who is receiving any type of meal provided by the school on census day. These meals have a meal type category of **School Provided**, with a description such as hot school meal or school sandwich.

3. Edit the information by clicking the required row, in the **School Dinner Taken** column, to toggle between a tick and blank (no meal taken), as required.

Using Attendance to Calculate School Dinners Taken on Census Day

The School Census Return only requires information about school meals provided by the school on census day. However, if SIMS Attendance is in use, the attendance data recorded for census day morning can be used to calculate all pupils who are present and are likely to be taking a school dinner.

The information calculated from attendance can be edited to so that school meals provided by the school only are collected in the return.

1. Click the **Calculate From Attendance** button.

> ***WARNING:*** *Clicking the* ***Calculate From Attendance*** *button overwrites existing data in the* ***School Dinner Taken*** *panel.*

If missing marks exist, a message is displayed:

Please ensure that registers have been taken. Missing marks have been interpreted as absent and no dinner taken.

2. Click the **Cancel** button to return to SIMS where missing marks can be entered or the **OK** button to continue.

A tick is entered against each pupil who is marked as present on census day morning (i.e. AM session). It is possible that some of these pupils are not taking meals provided by the school, e.g. they go home for dinner or bring a packed lunch from home. Meals provided by the school only are required for the return.

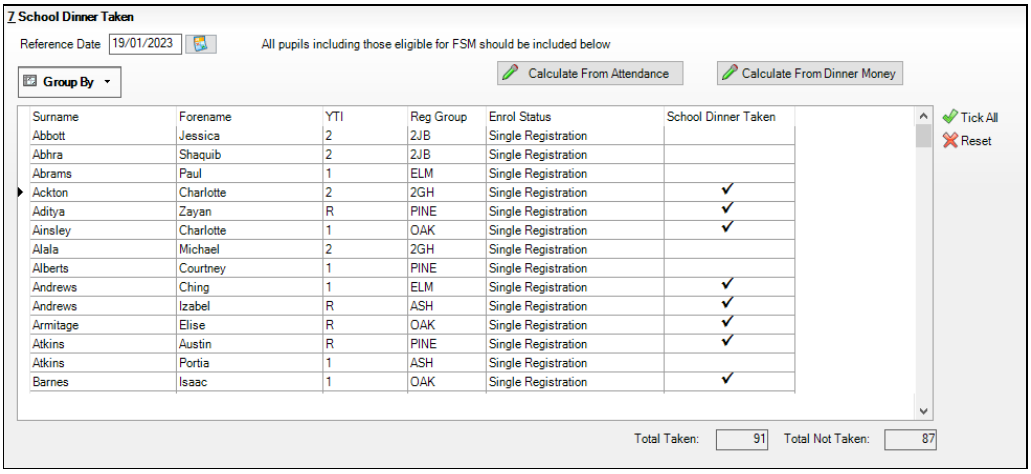
Use the **Group By** functionality to group pupils by **Year Taught In**, **Reg Group** or **Enrolment Status**, enabling school dinners taken information to be updated from class lists, etc.

3. Edit the information by clicking the required row, in the **School Dinner Taken** column, to toggle between a tick and blank (no meal taken), as required.

Using Manual Entry to Record School Dinners Taken on Census Day

If your school is not using SIMS Dinner Money or SIMS Attendance the number of school dinners taken on census day (i.e. meals provided by the school) can be entered manually.

1. Click the **Tick All** button to populate the **School Dinner Taken** column. All pupils are ticked indicating that they received a school dinner on census day.
2. Edit individual records by clicking the applicable **School Dinner Taken** cell to toggle between a tick and blank (no meal taken).



Reference Date 19/01/2023

All pupils including those eligible for FSM should be included below

Surname	Forename	YTI	Reg Group	Enrol Status	School Dinner Taken
Abbott	Jessica	2	2JB	Single Registration	
Abhra	Shaquib	2	2JB	Single Registration	
Abrams	Paul	1	ELM	Single Registration	
Ackton	Charlotte	2	2GH	Single Registration	✓
Aditya	Zayan	R	PINE	Single Registration	✓
Ainsley	Charlotte	1	OAK	Single Registration	✓
Alala	Michael	2	2GH	Single Registration	
Alberts	Courtney	1	PINE	Single Registration	
Andrews	Ching	1	ELM	Single Registration	✓
Andrews	Izabel	R	ASH	Single Registration	✓
Armitage	Elise	R	OAK	Single Registration	✓
Atkins	Austin	R	PINE	Single Registration	✓
Atkins	Portia	1	ASH	Single Registration	
Barnes	Isaac	1	OAK	Single Registration	✓

Total Taken: 91 Total Not Taken: 87

The **Total Taken** and **Total Not Taken** (located at the bottom of the panel) provide an indication of whether the number of school dinners taken is correct or whether further edits are required.

3. After the return has been created and validated, run the School Dinner Taken detail report and then check the report contents.
4. Continue editing until school dinner taken details are correct.

> ***WARNING:*** *Clicking the* ***Reset*** *button removes all existing ticks from the* ***School Dinner Taken*** *column.*

Entering Attendance Information

Termly attendance data (including attendance codes and the number of sessions missed) should be provided for non-boarder pupils and leavers aged four to 15 inclusive on 31/08/2022, who were on-roll for at least one session during the collection period from 01/01/2023 to 09/04/2023.

Initially the **Attendance** panel is blank. However, after clicking the **Calculate All Details** button (located in the **School Information** panel) the display changes.

> ***IMPORTANT NOTE:*** *Clicking the* ***Calculate All Details*** *button overwrites any edited data, in every panel, with the original data stored in SIMS. Do not use this button if you wish to keep any changes you have made.*

The information displayed in the **Attendance** panel (after the **Calculate All Details** button is clicked) is dependent on which of the following is applicable:

- SIMS Attendance is in use, the attendance codes being used are DfE compliant and there are either:
  - no missing marks

    or
  - missing marks.
- SIMS Attendance is in use and the attendance codes being used are DfE non-compliant.
- SIMS Attendance is not in use.

More Information:
Attendance Report on page *47*

SIMS Attendance Users

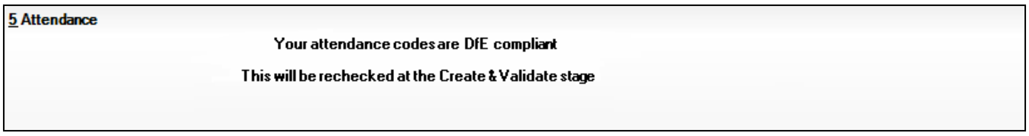
If SIMS Attendance is in use, data is collected on all categories of school attendance. Ensure that all missing marks and unexplained absences for the previous term have been dealt with before commencing the return.

*TIP: After the Create and Validate process is run, the Attendance detail report can be used to assist with the checking of attendance data. Select **Attendance Report** from the **Detail Report** drop-down list.*

Are your Attendance Codes DfE Compliant?

If Attendance is in use and your school is using DfE compliant attendance codes, attendance data is entered directly into the return, providing that there are no missing marks.

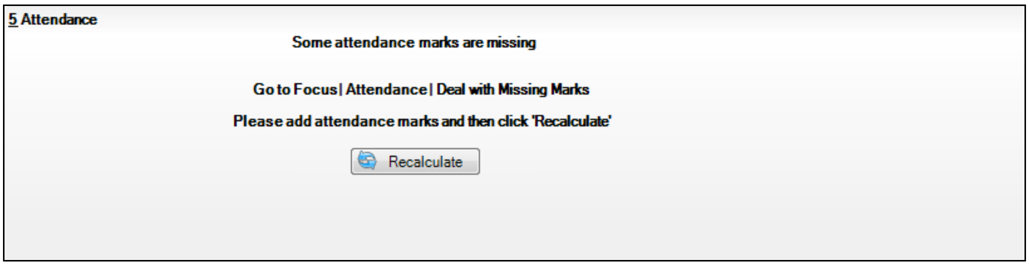
If all attendance marks have been entered in Attendance, the following message is displayed in the **Attendance** panel, informing you that your attendance codes are DfE compliant but will be rechecked at the Create and Validate stage.



Your attendance codes are DfE compliant

This will be rechecked at the Create & Validate stage

However, if any missing attendance marks are detected, the following message is displayed in the **Attendance** panel, requesting that you add the missing attendance marks.



Some attendance marks are missing

Go to Focus | Attendance | Deal with Missing Marks

Please add attendance marks and then click 'Recalculate'

1. Use the Deal with Missing Marks routine (**Focus | Attendance | Deal with Missing Marks**) to locate the missing marks and enter appropriate attendance codes.

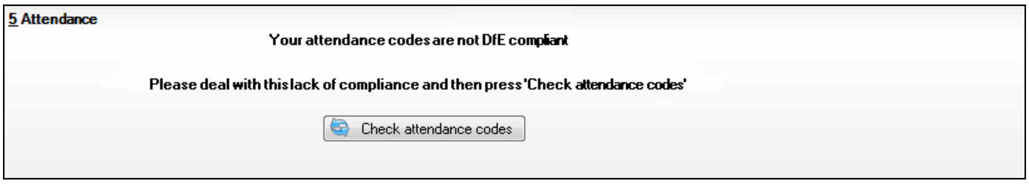
2. Return to the **Census Return Details** page and click the **Check missing marks** button in the **Attendance** panel to ensure that all missing marks have been dealt with.

> *NOTE: The Create and Validate process can still be run even if some attendance marks are missing. You will be asked if you wish to continue to create the return or cancel the Create and Validate process.*

More Information:
Producing Detail Reports on page *46*

Are your Attendance Codes DfE Non-Compliant?

If Attendance is in use but one or more invalid attendance codes have been detected, a message is displayed in the **Attendance** panel to inform you that your attendance codes are not DfE compliant.



Your attendance codes are not DfE compliant

Please deal with this lack of compliance and then press 'Check attendance codes'

1. Non-compliant codes must be dealt with. Please contact your Local Support Unit for assistance.
2. Click the **Check attendance codes** button to check that DfE attendance codes are now in use.

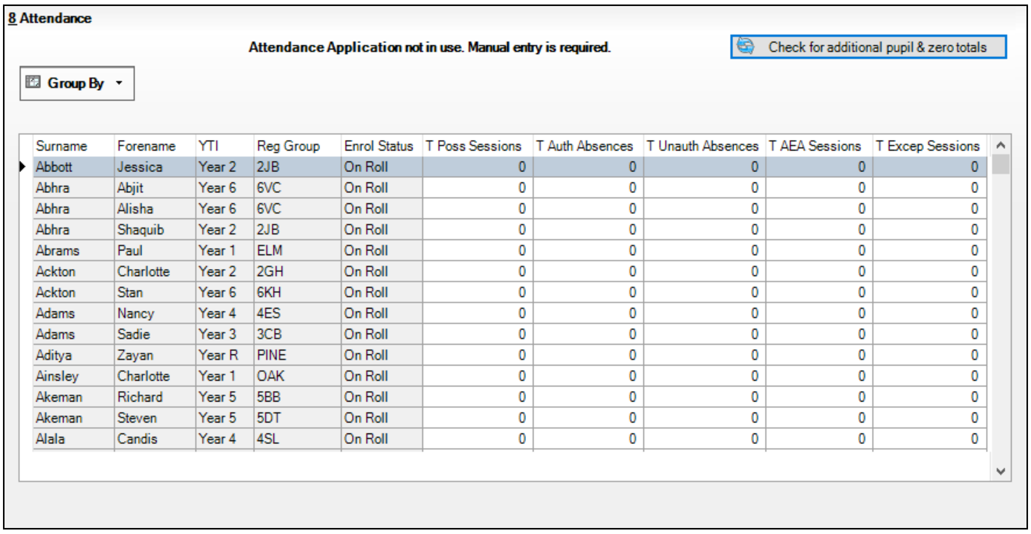
   If the attendance codes are now DfE compliant, a message informs you that the codes will be rechecked at the **Create & Validate** stage.
3. Click the **OK** button to continue.

SIMS Attendance Not in Use

If Attendance is not in use, the following data must be entered manually:

- Termly Possible Sessions (**T Poss Sessions**)
- Termly Sessions Missed due to Authorised Absence (**T Auth Absences**)
- Termly Sessions Missed due to Unauthorised Absence (**T Unauth Absences**)
- Total sessions attending approved educational activity (**T AEA Sessions**)

- Total sessions unable to attend due to exceptional circumstances (**T Excep Sessions**).



8 Attendance

Attendance Application not in use. Manual entry is required.

Surname	Forename	YTI	Reg Group	Enrol Status	T Poss Sessions	T Auth Absences	T Unauth Absences	T AEA Sessions	T Excep Sessions
Abbott	Jessica	Year 2	2JB	On Roll	0	0	0	0	0
Abhra	Abjit	Year 6	6VC	On Roll	0	0	0	0	0
Abhra	Alisha	Year 6	6VC	On Roll	0	0	0	0	0
Abhra	Shaquib	Year 2	2JB	On Roll	0	0	0	0	0
Abrams	Paul	Year 1	ELM	On Roll	0	0	0	0	0
Ackton	Charlotte	Year 2	2GH	On Roll	0	0	0	0	0
Ackton	Stan	Year 6	6KH	On Roll	0	0	0	0	0
Adams	Nancy	Year 4	4ES	On Roll	0	0	0	0	0
Adams	Sadie	Year 3	3CB	On Roll	0	0	0	0	0
Aditya	Zayan	Year R	PINE	On Roll	0	0	0	0	0
Ainsley	Charlotte	Year 1	OAK	On Roll	0	0	0	0	0
Akeman	Richard	Year 5	5BB	On Roll	0	0	0	0	0
Akeman	Steven	Year 5	5DT	On Roll	0	0	0	0	0
Alala	Candis	Year 4	4SL	On Roll	0	0	0	0	0

1. To filter the display of pupils in the **Attendance** panel, select **Year Group**, **Registration Group** or **Enrolment Status** from the **Group By** drop-down list.

   Alternatively, select **Group by None** to display a list of all pupils.
2. To sort the displayed data by surname, forename, year group, registration group or enrolment status, click the appropriate column header.
3. For each pupil, enter the correct attendance numbers in the appropriate columns.
4. To clear the attendance information and check for additional pupils, click the **Check for additional students & zero totals** button.

> ***WARNING:*** *If the **Check for additional students & zero totals** button is clicked, any attendance data entered manually is lost.*

04| Completing the School Census Summer Return

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Creating and Validating the School Census Return

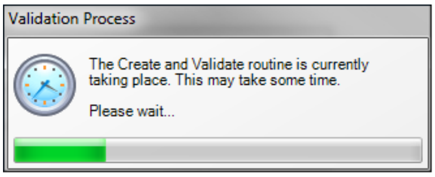
A return must be created, validated and authorised before it can be sent to your Local Authority or uploaded to the DfE COLLECT data collection website (as applicable to your school).

Validating the return creates an unauthorised return file, which is then run against a set of DfE rules. When the validation is complete, a list of errors and queries is displayed.

An error is caused by either missing or inaccurate data, whilst a query highlights data that is unusual or not as expected, e.g. there are no pupils showing as having special educational needs.

1. Select **Routines | Statutory Returns | School Census** to display the **Census Return** browser.
2. Click the **Search** button to display a list of returns.
3. Double-click the required return to display the **Census Return Details** page.
4. Click the **Create & Validate** button to start the process. There may be a short delay, depending on the number of pupils at your school.

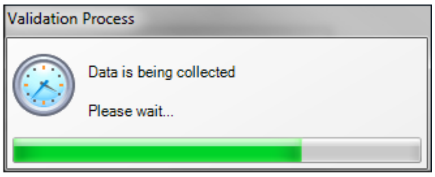
A progress bar is displayed, indicating that the Create and Validate process is being performed.



Validation Process

The Create and Validate routine is currently taking place. This may take some time.

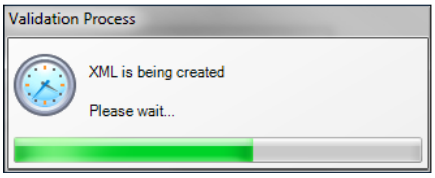
Please wait...



Validation Process

Data is being collected

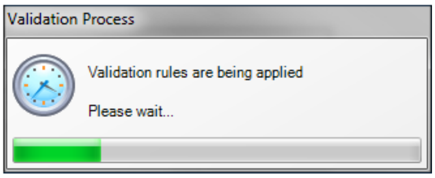
Please wait...



Validation Process

XML is being created

Please wait...



Validation Process

Validation rules are being applied

Please wait...

During the Create and Validate process, SIMS examines the data for any anomalies applicable to your school phase, e.g. no top-up funding information, missing attendance marks, permanent exclusions without a final governor review result, etc.

If an anomaly if found, a message is displayed, which provides the opportunity to continue to create and validate or cancel the process, so that details can be checked. Detail reports are available to assist you when checking details.

When the validation process is complete, the **Validation Errors Summary** panel is displayed at the bottom of the screen.

Additional Resources:

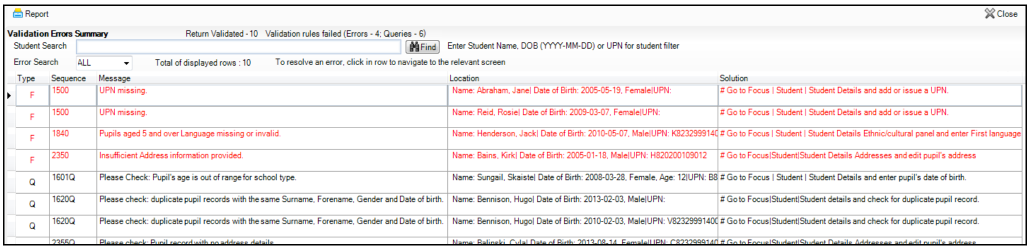
Dealing with Missing Marks section in the *Edit Marks Routine* chapter of the *Managing Pupil/Student Attendance* handbook

Recording Exclusion chapter of the *Managing Pupil/Students* handbook

The *DfE Validations and SIMS Solutions Excel* workbook (https://customer.support-ess.com/csm?id=kb_article_view&sysparm_article=KB0050524).

Resolving Validation Errors and Checking Queries

After creating the return file and validating the data, any errors and queries found are listed in the **Validation Errors Summary** panel.



Validation Errors Summary Return Validated - 10 Validation rules failed (Errors - 4; Queries - 6)

Student Search: Enter Student Name, DOB (YYYY-MM-DD) or UPN for student filter

Error Search: ALL

Total of displayed rows : 10

To resolve an error, click in row to navigate to the relevant screen

Type	Sequence	Message	Location	Solution
F	1500	UPN missing.	Name: Abraham, Jane| Date of Birth: 2005-05-19, Female|UPN:	# Go to Focus | Student | Student Details and add or issue a UPN.
F	1500	UPN missing.	Name: Reid, Rosie| Date of Birth: 2009-03-07, Female|UPN:	# Go to Focus | Student | Student Details and add or issue a UPN.
F	1840	Pupils aged 5 and over Language missing or invalid.	Name: Henderson, Jack| Date of Birth: 2010-05-07, Male|UPN: K823299914(	# Go to Focus | Student | Student Details Ethnic/cultural panel and enter First language
F	2350	Insufficient Address information provided.	Name: Bains, Kirk| Date of Birth: 2005-01-18, Male|UPN: H820200109012	# Go to Focus|Student|Student Details Addresses and edit pupil's address
Q	1601Q	Please Check: Pupil's age is out of range for school type.	Name: Sungail, Skaiste| Date of Birth: 2008-03-28, Female, Age: 12|UPN: B8	# Go to Focus | Student | Student Details and enter pupil's date of birth.
Q	1620Q	Please check: duplicate pupil records with the same Surname, Forename, Gender and Date of birth.	Name: Bennison, Hugo| Date of Birth: 2013-02-03, Male|UPN:	# Go to Focus|Student|Student details and check for duplicate pupil record.
Q	1620Q	Please check: duplicate pupil records with the same Surname, Forename, Gender and Date of birth.	Name: Bennison, Hugo| Date of Birth: 2010-02-03, Male|UPN: V82329991400	# Go to Focus|Student|Student details and check for duplicate pupil record.
	2355Q	Please check: Pupil record with no address details.	Name: Balinski, Cyla| Date of Birth: 2013-08-14, Female|UPN: C823299914(	# Go to Focus|Student|Student Details Addresses and edit pupil's address

The **Validation Errors Summary** panel header displays the number of errors and queries found when the Create and Validate routine was run. A pupil and error search facility is also available.

The following information is provided to help with the resolution of validation failures:

- **Type** - the type of validation rule.
  - Failure (**F** displayed in red) indicates an error that must be resolved.
  - Query (**Q** displayed in black) indicates that there are unusual data conditions. These should be considered and corrected, if necessary.
- **Sequence** - the validation error or query number.
- **Message** - the validation error or query message text.
- **Location** - the specific record in SIMS that contains the error or query.
- **Solution** - the SIMS menu route and/or instructions about where/how the error can be corrected or the query checked.

> *TIP: Using the Solution hyperlinks*
>
> *When the pointer is hovered over an error or query row, it changes to a hand if a hyperlink is available to the area of SIMS where the problem can be checked.*
>
> *A hyperlink is also indicated by a hash symbol (**#**) preceding the **Solution** text.*
>
> *Click the required hyperlink to display the specific area in SIMS where the record(s) can be checked/corrected.*

To assist in the viewing of errors and queries:

- When the mouse pointer is hovered over a **Message**, **Location** or **Solution**, hover help displays the entire content of that cell.
- The Student Search functionality can be used to display all errors and queries relating to a particular pupil.
  a. Enter all or part of a UPN, pupil's surname or date of birth in the **Student Search** field.
  b. Select the required record from the **Student Search** drop-down list to populate the **Student Search** field.
  c. Click the **Find** button to display the applicable validation records.
- Use the **Errors Search** to display the required error or query you want to view. Select **ALL**, **ERRORS**, **QUERIES** or the required number from the drop-down list. The total number of rows that relate to the selected validation is displayed adjacent to the **Error Search** field.
- By default, when **ALL** is selected from the **Errors Search** drop-down list, the errors are displayed at the top of the list.

  The order of the items in the list can be changed by clicking the appropriate column heading.

  The width of the columns can be changed by dragging the dividing line between the column headings until the required size is achieved.
- View a summary of validation failures by clicking the **Report** button (located above the **Validation Errors Summary** panel, on the left-hand side). The report is displayed in your web browser, from where it can be printed or transferred to another application, if required.

The report is saved automatically in the **Census Folder** (specified previously via the census browser). The original report, which was generated when the **Create & Validate** button was clicked is also stored in this folder.

- Your generated report file name: `Validation Errors Summary.HTML`
- Original report file name: `<LACode><SchoolNumber>_<SurveyType>_<LACode><LL><Year>_<SerialNumber>_ValidationErrorsSummary.HTML`

For guidance on navigating to files on your local workstation when you are working in a Hosted environment, please contact your System Manager or Local Support Unit.

Resolve as many errors and check as many queries as possible then revalidate the return details. Continue to resolve failures and revalidate the return as many times as necessary.

NOTE: All errors must be resolved, and all queries must be investigated.

If at any point you want to hide the list of error and queries, click the **Close** button located at the top right-hand side of the **Validation Errors Summary** panel. The list is displayed again when the Create and Validate process is run.

Many of the errors generated can be fixed quickly using bulk update functionality (via **Routines | Pupil | Bulk Update**). For more information, please refer to the *Managing Pupil/Students* handbook.

Producing Detail Reports

Detail reports can be used to check the data stored in SIMS that has been used to create the return. The reports can be produced as soon as the return has been created and validated.

Each detail report header displays the **Security Message** that was defined in the **Census Return** browser, the **Report Criteria** and the **Total Pupils** who are listed in the report. Also included in the report header is the **School Name**, the **Fileset Number**, the **Filename**, the **Report Created** date, and the **XML Version**.

Where a pupil's National Curriculum Year group is different from what their date of birth would suggest, the applicable **YTI** cell is highlighted in yellow.

The reports available for selection may vary depending on your school phase.

On-Roll Basic Details Report

Report Criteria: Pupils on-roll on census day.

This report provides basic information about the pupils on-roll at your school on census day: UPN, legal surname, legal forename, preferred surname, former surname, date of birth (DOB), gender, year taught in (YTI), date of admission (DOA), enrolment status, ethnicity, language, class type, part-time status and boarder status.

Leavers Basic Details Report

Report Criteria: Pupils not on-roll on census day:

- Leavers with attendance from 01/01/2023 to 09/04/2023
- Leavers with exclusions from 01/08/2022 to 09/04/2023
- Leavers with funding and monitoring from 01/08/2022 to 18/05/2023
- Leavers with alternative provision from 19/01/2023 to 18/05/2023.

This report provides basic information about leavers: UPN, former UPN, legal surname, legal forename, middle names, former surname, date of birth (DOB), gender, date of admission (DOA), date of leaving (DOL), ethnicity, language, part-time status, boarder status, attendance and exclusions.

Exclusions Report

Report Criteria: Pupils with exclusions from 01/08/2022 to 09/04/2023:

- On-roll pupils and leavers
- Suspensions (excluding lunchtime suspensions)
- Permanent Exclusions with final review.

NOTE: Permanent exclusions are collected only if a final review exists.

The following details about pupils who match the report criteria are displayed: UPN, legal surname, legal forename, date of birth (DOB), gender, date of admission (DOA), date of leaving (DOL), exclusion category, reason(s) for exclusion, exclusions start date, number of sessions from which the pupil was excluded, SEN provision and on-roll status.

NOTE: Suspension is the new name for a Fixed Term Exclusion.

Attendance Report

Report Criteria: Pupils with attendance one term ago. 01/01/2023 to 09/04/2023.

NOTE: On-roll and leavers (but not boarders) who were aged four to 15 at 31/08/2022.

The Attendance report provides basic pupil information about the pupils who match the report criteria, i.e. UPN, legal surname, legal forename, date of birth (DOB), gender, date of admission (DOA) and year taught in (YTI).

The attendance information included in the report is dependent on whether Attendance is in use.

- Attendance in Use:
    - termly sessions possible
    - on-roll status
    - present codes
    - approved education activity codes
    - attendance codes (divided into authorised and unauthorised sessions)
    - attendance not required codes.

- Attendance Not in Use:
    - sessions possible
    - authorised absence sessions
    - unauthorised absence sessions
    - sessions approved educational activity (AEA)
    - exceptional sessions
    - On Roll Status.

Absentees Report

Report Criteria: On-roll pupils and leavers (but not boarders) who have an absence rate of 10% or above, with attendance one term ago (01/01/2023 to 09/04/2023), who were aged four to 15 at 31/08/2022.

An individual pupil's overall absence rate is calculated as follows:

$$\text{Overall absence rate} = \frac{\text{Total overall absence sessions}}{\text{Total sessions possible}} \times 100$$

The report provides the following information about the pupils who match the report criteria: UPN, legal surname, legal forename, date of birth (DOB), gender, year taught in (YTI), number of sessions possible, session absence (i.e. the number of authorised plus unauthorised absences), on-roll status and enrolment status.

This report can assist with the tracking of absence (particularly persistent absence) and highlights those absences that might need to be tracked.

SEN Report

Report Criteria: On-roll pupil with SEN Provision/Status **E** (Education, Health and Care Plan) or **K** (SEN Support).

This report provides a list of pupils who have special educational needs. Displayed are their UPN, legal surname, legal forename, date of birth (DOB), gender, year taught in (YTI), SEN provision, member of SEN unit and member of resourced provision indicator and on-roll status.

Address Details Report

Report Criteria: Pupils on-roll on census day.

This report provides a list of pupils, their UPN, former UPN, legal surname, legal forename, middle name(s), post code, unique property reference number (UPRN), address details and the administrative area/county.

Definition: Unique Property Reference Number (UPRN) is a unique identifier (reference number) that links together related address records across different software programmes. This enables organisations to collate and share information based on a common reference number.

School Dinner Taken Report

Applicable to schools with pupils in Reception, Year 1 and Year 2

Report Criteria: Pupils on-roll on census day, who have taken school dinner on the reference date.

- Pupils in Year Taught In R, 1 and 2.
- Pupils in Year Taught In X who are aged four to six and who were born between 01/09/2015 and 31/08/2018 inclusive (Special schools only).

The report header also displays the total number of pupils, the total number of school dinners taken and the total number of school dinners not taken.

This report provides the following information about pupils who match the report criteria: UPN, legal surname, legal forename, date of birth (DOB), gender, year taught in (YTI) and school dinner taken (yes/no).

Free School Meal Eligibility Report

Report Criteria: On-roll pupils on census day who were eligible for free school meals on or after 20/01/2023 and up to census day.

This report provides information on free school meal eligibility for pupils who match the report criteria: UPN, legal surname, legal forename, date of birth (DOB), gender, year taught in (YTI), free school meal eligibility start date, end date and the UK country in which the eligibility applies, and on-roll status.

> *NOTES: This report includes any free school meals recorded outside of England, e.g. Wales.*
>
> *Only Free School Meals records where the country recorded is England or <blank> attract the Pupil Premium.*

Top-up Funding Report

Report Criteria: On-roll pupils who have been awarded Top-up Funding as at census day.

The report provides the following information: UPN, legal surname, legal forename, date of birth (DOB), gender, year taught in (YTI) and SEN provision.

Funding and Monitoring Report

Not applicable to Nursery schools

Report Criteria: On-roll pupils and leavers with funding and monitoring information for the collection period 01/08/2022 to 18/05/2023.

The report provides the following pupil details, and funding and monitoring information: UPN, legal surname, legal forename, date of birth (DOB), gender, Year Taught In (YTI), enrolment status, date of leaving (DOL), funding and monitoring (FAM) type, e.g. NLM (National Learning and Monitoring), funding and monitoring (FAM) code, description, cumulative hours and on-roll status.

Funding and Monitoring key code:

01 = Pupil in receipt of National Tutoring Programme (NTP)

Additional Resources:

Preparing for the School Census Summer 2023 Return guide

Early Years Report

Applicable to schools with Early Years children only

Report Criteria: Pupils with early years data who are on-roll on census day.

- All two year old pupils who were born between 01/04/2020 and 31/03/2021 (hours at setting and funded hours only)
- All three year old pupils who were born between 01/09/2018 and 31/03/2020
- All four year old pupils who were born between 01/04/2018 and 31/08/2018 (with Year Taught In E1, E2, N1 and N2).

The report displays the following information: UPN, legal surname, legal forename, date of birth (DOB), gender, year taught in (YTI), hours at setting, funded hours, 30 hour code, extended funded hours and disability access fund.

Post Looked After Arrangements Report

Report Criteria: On-roll pupils who have post looked after arrangements as at census day.

The report provides the following information about pupils who have post looked after arrangements: UPN, legal surname, legal forename, date of birth (DOB), gender, year taught in (YTI) and post looked after arrangements, e.g. ceased to be looked after through adoption.

Alternative Provision Report

Report Criteria: School Arranged Alternative Provision Placements that fall within the Alternative Provision Placement data collection period:

- On-roll (19/01/2023 to 18/05/2023)
- Leavers (19/01/2023 to 17/05/2023).

The report provides the following information: UPN, legal surname, legal forename, date of birth (DOB), gender, Year Taught In (YTI), alternative provision URN, alternative provision UKPRN, alternative provision setting, companies house number, alternative provision postcode, alternative provision reason, start date, SEN on start date, end date, SEN on end date, alternative provision attendance, alternative provision sessions and on-roll status.

Permanent Exclusions without Final Review Report

Not applicable to Nursery schools

Report Criteria: On-roll pupils and leavers with permanent exclusions and without a final review from 01/01/2022 to 09/04/2023.

> *NOTE: The date range for this report does not match the collection dates for the school census. This is intentional to enable all instances of permanent exclusions without final review to be checked.*

This report details permanent exclusions that do not have a final review and will not be included in the census, either because the exclusion process is still ongoing or because the school has not recorded the final review result. The report has been provided to assist schools in checking whether details have been recorded accurately.

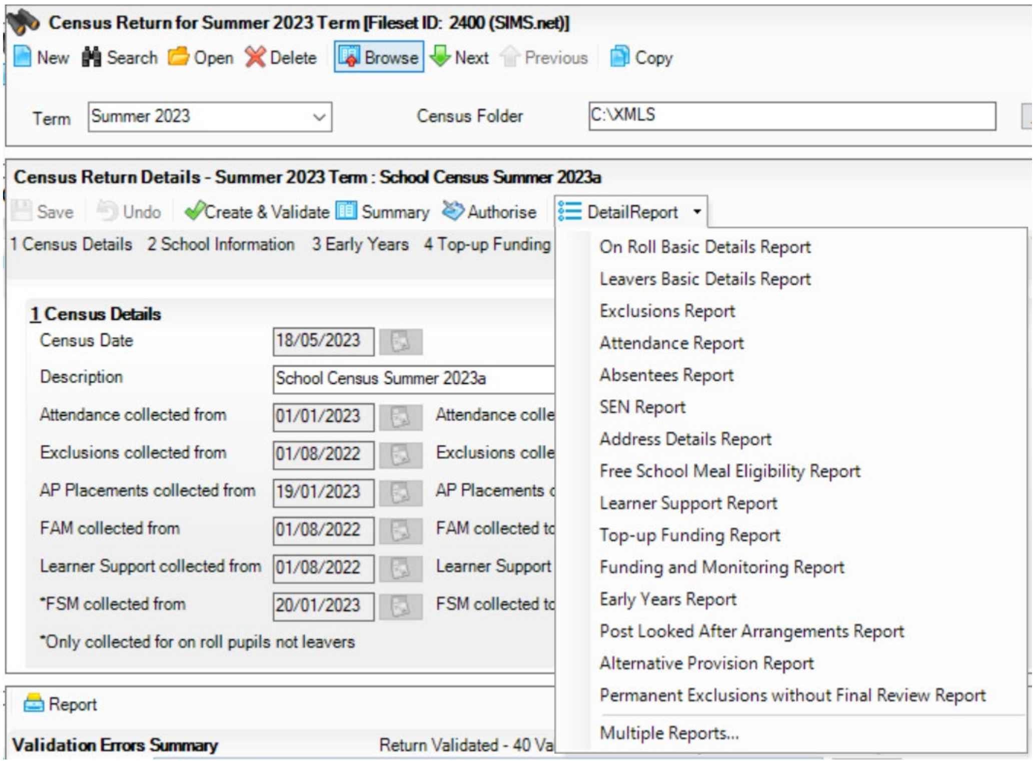
The following information is included in the report: UPN, legal surname, legal forename, date of birth (DOB), gender, date of admission (DOA), date of leaving (DOL), reason for exclusion, exclusion start date, SEN expert requested (Yes/No) and on-roll status.

Generating Detail Reports

Selecting a Single Detail Report

Select the required report from the **Detail Report** drop-down list located at the top of the **Census Return Details** page. The selected report is generated automatically.

> *NOTE: The contents of the graphics are examples only of what you might expect to see when using SIMS to produce the School Census Return.*



Census Return for Summer 2023 Term [Fileset ID: 2400 (SIMS.net)]

Term: Summer 2023

Census Folder: C:\XMLS

Census Return Details - Summer 2023 Term : School Census Summer 2023a

1 Census Details

Census Date: 18/05/2023

Description: School Census Summer 2023a

Attendance collected from: 01/01/2023

Exclusions collected from: 01/08/2022

AP Placements collected from: 19/01/2023

FAM collected from: 01/08/2022

Learner Support collected from: 01/08/2022

*FSM collected from: 20/01/2023

*Only collected for on roll pupils not leavers

Validation Errors Summary

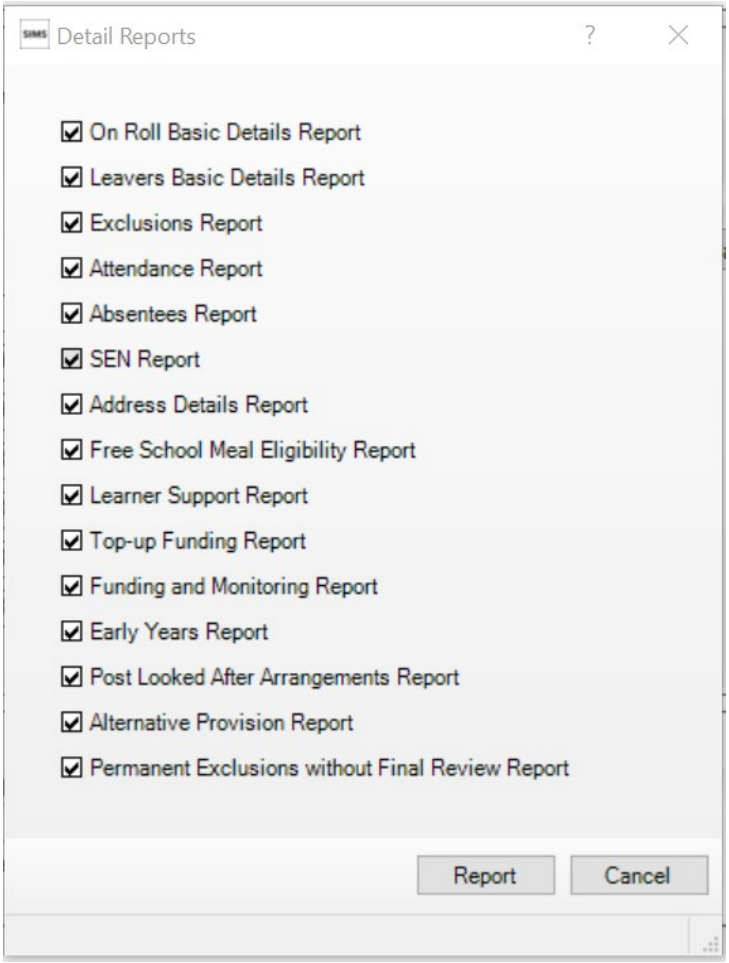
Return Validated - 40 Va

New
Search
Open
Delete
Browse
Next
Previous
Copy
Save
Undo
Create & Validate
Summary
Authorise
DetailReport
1 Census Details
2 School Information
3 Early Years
4 Top-up Funding
Attendance colle
Exclusions colle
AP Placements c
FAM collected to
Learner Support
FSM collected to
Report
On Roll Basic Details Report
Leavers Basic Details Report
Exclusions Report
Attendance Report
Absentees Report
SEN Report
Address Details Report
Free School Meal Eligibility Report
Learner Support Report
Top-up Funding Report
Funding and Monitoring Report
Early Years Report
Post Looked After Arrangements Report
Alternative Provision Report
Permanent Exclusions without Final Review Report
Multiple Reports...

Selecting Multiple Detail Reports

1. Select **Multiple reports** from the bottom of the **Detail Report** drop-down list to display the **Detail Reports** dialog. By default, all detail reports are selected.

   The reports that are available may vary according to your school phase.



☑ On Roll Basic Details Report
☑ Leavers Basic Details Report
☑ Exclusions Report
☑ Attendance Report
☑ Absentees Report
☑ SEN Report
☑ Address Details Report
☑ Free School Meal Eligibility Report
☑ Learner Support Report
☑ Top-up Funding Report
☑ Funding and Monitoring Report
☑ Early Years Report
☑ Post Looked After Arrangements Report
☑ Alternative Provision Report
☑ Permanent Exclusions without Final Review Report

2. If any reports are not required, deselect the associated check box.
3. Click the **Report** button to generate the selected report(s), which are then displayed in your default web browser.

   The report(s) are saved automatically in the **Census Folder**, which was specified in the **Census Return** browser, e.g. `C:\SCHOOL CENSUS`. For guidance on navigating to files on your local workstation when you are working in a Hosted environment, please contact your System Manager or Local Support Unit.

   The report is saved with a filename that consists of the following data fields separated by underscores ('_'):

   `<LACode><SchoolNumber>_<SurveyType>_<LACode><LL><Year>_<SerialNumber>_<name of the report>_.html`

   For example:
   `8232999_SC2_823LL23_001_onroll_basic_details_report.html`.

More Information:
Configuring the Census Folder on page *13*

Printing a Report from your Web Browser

IMPORTANT NOTE: *Any printed reports containing information that could identify a person (e.g. their name, address, UPN, etc.) should be used for validation purposes only and should not be retained. The Security Message (displayed at the top of each report) can be customised to include, for example, instructions for the destruction of the printed reports.*

1. With the generated report displayed in your web browser, select the **Print** option (**Ctrl**+**P**) to display the **Print** dialog.
2. Ensure that the print settings are correct then click the **Print** button.
3. Click the **Close** button on the top right-hand corner of the web page to close the report and return to the census page.

Deleting Temporary Web Browser Files

It is recommended that, after viewing statutory returns reports, you delete any temporary web browser files to ensure that any cached data (i.e. data stored on your machine, which enables high-speed access to previously viewed data) is removed.

This prevents the information, e.g. copies of web pages that are stored in the local cache for faster viewing, remaining on the hard disk of the device in the temporary directory, where it is not secure.

When this process is performed, all temporary files (including any Statutory Returns reports files) that the browser has cached are deleted.

To clear the cache, open your web browser, then clear the browsing data history. For more information, please refer to the documentation applicable to the web browser you are using.

Producing the Summary Report

The Summary report enables the school staff, who are involved in the return's preparation, to assess the accuracy and completeness of the return data. It should then be passed to the Head Teacher for their review.

NOTE: When the return is authorised, the Summary report is automatically generated and displayed in your web browser.

Generating the Summary Report

Click the **Summary** button, located at the top of the **Census Return Details** page, to display the report in your default web browser.

The report is saved automatically in the **Census Folder**, which was specified in the **Census Return** browser, e.g. `C:\SCHOOL CENSUS`. For guidance on navigating to files on your local workstation when you are working in a Hosted environment, please contact your System Manager or Local Support Unit.

The report is saved with a filename that consists of the following data fields separated by underscores ('_'):

`<LACode><SchoolNumber>_<SurveyType>_<LACode><LL><Year>_<SerialNumber>_<name of the report>_.html`

For example: `8232999_SC2_823LL23_001_Summary_Report.html`.

It is important that the Head Teacher checks all the information on the Summary report before the return is authorised. Your LA might request that a copy of the Summary report is signed by the Head Teacher and sent to the LA when the return has been authorised.

More Information:
Configuring the Census Folder on page *13*
Generating Detail Reports on page *51*
Authorising the Return on page *55*
Deleting an Unauthorised Return on page *59*

Editing an Unauthorised Return

The return details, e.g. **Description**, **School Information**, etc. can be edited via the **Census Return Details** page at any time prior to authorisation.

IMPORTANT NOTE: *An authorised return cannot be edited. If changes are required to an authorised return, use the* ***Copy*** *facility to produce a duplicate return (with a unique description) in which the changes can be made.*

1. Select **Routines | Statutory Returns | School Census** to display the browser.
2. Ensure that the **Census Folder** and the **Security message for Reports** are correct, then click the **Search** button to display any previously created returns. Unauthorised return files can be recognised by their `.UNA` suffix.
3. Double-click the required return. Alternatively, highlight the required return, then click the **Open** button to display the **Census Return Details** page.
4. Edit the return details as required.
5. Click the **Create & Validate** button to display the **Validation Errors Summary** panel.
6. Run the detail reports and Summary report and then use the information they provide to assist with resolving errors and queries.
7. Repeat the editing and Create & Validate process again, if necessary.
8. Click the **Save** button.

More Information:
Configuring the Census Folder on page *13*
Specifying the Security Message for Reports on page *14*
Resolving Validation Errors and Checking Queries on page *44*
Producing Detail Reports on page *46*
Producing the Summary Report on page *53*

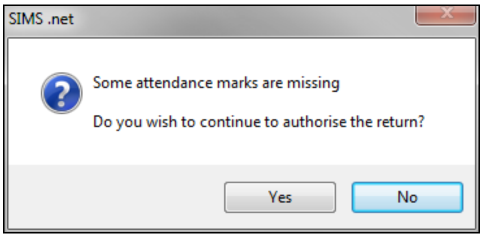
Authorising the Return

A return must be authorised before it can be submitted to your Local Authority or uploaded to the DfE COLLECT data collection website (as applicable to your school). If you authorise a return and subsequently need to make amendments, you must either make a copy of the return and work on the copy or create a new return.

Before authorising the return, you should ensure that all the information displayed on the **Census Return Details** page is correct and does not require further editing. This is because it is not possible to edit details after the return is authorised. The content of the Summary report can be useful when reviewing the information.

1. Click the **Authorise** button.

   If missing marks exist, the following message is displayed.

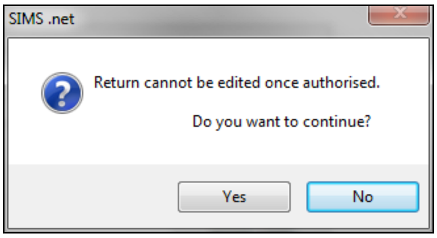


Some attendance marks are missing

Do you wish to continue to authorise the return?

2. Click the **Yes** button to continue with the authorisation process or the **No** button if you want to return to SIMS where the missing marks can be entered.

   If you choose to continue, a message reminds you that the return cannot be edited once it is authorised.

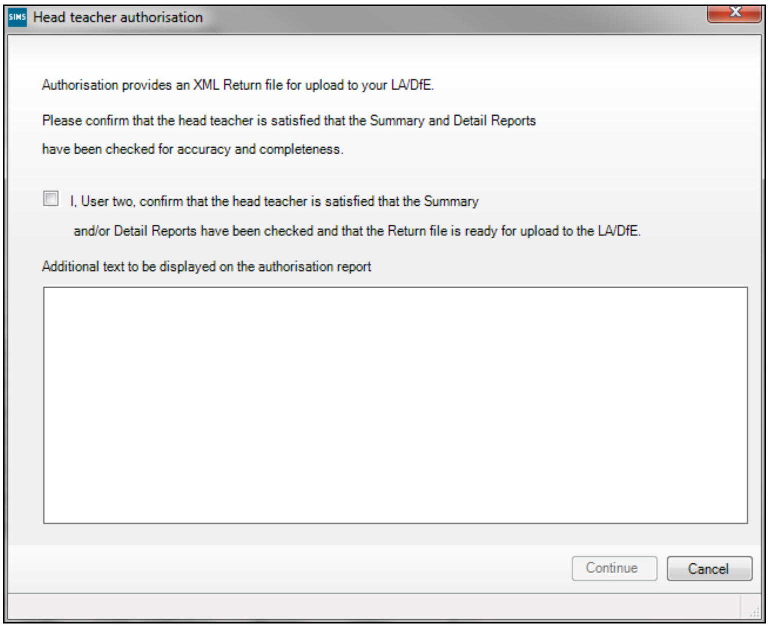


Return cannot be edited once authorised.

Do you want to continue?

3. Click the **Yes** button to continue or the **No** button to return to SIMS where edits can be made to the data before authorising.

If you choose to continue, the **Head teacher authorisation** dialog is displayed.



Authorisation provides an XML Return file for upload to your LA/DfE.

Please confirm that the head teacher is satisfied that the Summary and Detail Reports have been checked for accuracy and completeness.

☐ I, User two, confirm that the head teacher is satisfied that the Summary and/or Detail Reports have been checked and that the Return file is ready for upload to the LA/DfE.

Additional text to be displayed on the authorisation report

4. Enter any additional text to be displayed on the authorisation report, if required. This may be requested by your LA, e.g. to explain the reason for any validation failures.
5. Select the confirmation check box to confirm that the Head Teacher is satisfied that the Summary and/or detail reports have been checked and that the return file is ready for upload to your LA/DfE.

   When the confirmation check box is selected, the **Continue** button is activated enabling you to complete the authorisation process.
6. Click the **Continue** button to authorise the return and prompt the following actions:
   - The return file extension changes automatically from UNA (unauthorised) to XML (authorised).
   - The Summary report, Authorisation report and Validation Errors Summary report are generated automatically and displayed in your web browser, from where they can be printed, if required.

All reports (including detail reports) and the XML file are saved in the **Census Folder**, which was specified previously in the **Census Return for Summer 2023 Term** browser.

These reports can be viewed using the Retrieve Authorised Census Return Files routine (via **Tools | Statutory Return Tools**). This routine also provides the opportunity to download the files to a different folder.

IMPORTANT NOTE: *The retrieved files contain sensitive information. Ensure that authorised personnel only have access to the download folder.*

For guidance on navigating to files on your local workstation when you are working in a Hosted environment, please contact your System Manager or Local Support Unit.

After the return is authorised, reports based on cohorts can be created (via **Reports | Design Reports**), so that items collected in the return can be tracked. Provided that **Student** has been selected as the data area, the Statutory Returns sub-report is available for selection when specifying the fields to be included in the report (the last node).

Additional Resources:

Designing and Running Reports handbook

More Information:
Producing the Summary Report on page *53*
Retrieving Authorised Census Return Files on page *57*
Copying a Return on page *58*

Submitting the Return

When the return has been completed and the Summary report has been signed by the Head Teacher (if requested to do so by your LA), the `.XML` file can be uploaded to the DfE COLLECT data collection website or sent to your LA, depending on the instructions you have been given.

Guidance about how Local Authorities, schools and academies should submit the census data is available on the GOV.UK website (https://www.gov.uk/guidance/school-census).

The authorised return file can be located in the folder previously specified in the **Census Return** browser. For guidance on navigating to files on your local workstation when you are working in a Hosted environment, please contact your System Manager or Local Support Unit.

***IMPORTANT NOTE:** An authorised file cannot be edited. If you need to make changes to an authorised file, you must make a copy of the original file, rename it and work on the copy.*

Retrieving Authorised Census Return Files

Authorised returns are stored in your Document Management Server (DMS). The Returns Manager can download and run the reports associated with previous authorised returns enabling the data for the current return to be compared with that submitted previously.

1. Select **Tools | Statutory Returns Tools | Retrieve Authorised Census Return Files** to display the **Retrieve Authorised Census Return Files for <census name>** page.
2. Select the type of census required from the **Return Type** drop-down list to display a list of previous returns that match the selected criteria.
3. By default, the **Download to** field displays the folder specified previously in the **Census Return** browser. To specify a different folder:
   a. Click the **Select a folder** button (**...**) to display the **Browse For Folder** dialog. Navigate to the location of the required folder then highlight it. If a suitable folder does not exist, click the **Make New Folder** button then enter a suitable folder name.

> ***IMPORTANT NOTE:*** *Ensure that authorised personnel only have access to the download folder because the retrieved files contain sensitive information.*

For guidance on navigating to files on your local workstation when you are working in a Hosted environment, please contact your System Manager or Local Support Unit.

   b. Click the **OK** button to select or create the folder and then return to the **Retrieve Authorised Return Files for <census name>** page, where the chosen folder name is displayed in the **Download to** field.

4. Highlight the return you wish to retrieve then click the **Retrieve Files** button.

   The authorised return file (i.e. the XML file) and all reports associated with the selected return are downloaded from your DMS to the specified folder. The folder and its contents are then displayed automatically, enabling you to open the required files in your web browser.

5. The contents of the specified folder can be viewed again by clicking the **Folder** button adjacent to the **Download to** field.

   If you want to create reports based on cohorts, so that items collected in the return can be tracked, a sub-report is available (via **Reports | Design Reports**).

   The **Statutory Returns** sub-report is available for selection only if **Student** has been selected as the Data Area.

   When you **Select fields to be included in the report**, the **Statutory Returns** sub-report is located at the bottom of the list (the last node). Three options are available for selection under this sub-report: **Authorised Date**, **File Name** and **Return Description**.

Additional Resources:

Designing and Running Reports handbook

Copying a Return

An unauthorised return can be copied and saved as a new return. This enables a 'snapshot' of a return to be taken at any time providing a backup of any manual changes that have been made to the return, for example before recalculating details.

This functionality can also be used to make a copy of an authorised return if the LA or DfE requires it to be resubmitted. The necessary corrections can then be made to the data. The copied return must be saved, created, validated and authorised before resubmitting.

> *NOTE: Ensure that the return you wish to replicate is not open at the time of copying.*

1. Select **Routines | Statutory Returns | School Census** to display the census browser.
2. Click the **Search** button to ensure that the list of returns is displayed.
3. Highlight the file you want to copy then click the **Copy** button.

A message prompts for confirmation that you wish to make a copy of the selected return.

> ***IMPORTANT NOTE:*** *Any values for Early Years, Top-up Funding, Post Looked After Arrangements, Funding and Monitoring, and Attendance (where applicable), will not be copied but will be populated from the current values held in the database.*
>
> *The Create & Validate routine must be run to generate a new census file.*

4. Click the **Yes** button to make the copy, which is then displayed in the browser as:

   `Copy of <description of selected file>.`

5. To rename the copied return, highlight it, then click the **Open** button to display the **Census Return Details** page.
6. In the **Census Details** panel, edit the **Description** then click the **Save** button.

> ***IMPORTANT NOTE:*** *A unique description must be used for each return. If duplicate returns are detected, an error message is displayed.*

Deleting an Unauthorised Return

During the return process, several copies of the return might be created, e.g. to track progress. When the return has been authorised successfully, it is advisable to delete any versions of the return that are no longer required. This keeps the number of files in the storage folder and listed in the browser to a minimum, therefore removing confusion and lessening the risk of selecting the incorrect return.

The Delete routine can be used to remove unwanted returns at any time prior to the relevant return being authorised.

> ***IMPORTANT NOTES:*** *When a return file is deleted, any associated files, e.g. Validation Errors Summary, detail reports, etc. that have been produced are also deleted.*
>
> *Any return files that have already been authorised cannot be deleted.*

1. Select **Routines | Statutory Returns | School Census** to display the browser.
2. Click the **Search** button to ensure that the list of return files is displayed.
3. Highlight the return file to be deleted, then click the **Delete** button. A message prompts for confirmation that the selected return should be deleted.
4. Click the **Yes** button to permanently delete the selected return file and all associated report files.

   The selected return file and associated reports are removed from the browser and the storage folder.

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