SIMS

Producing the School Census Summer 2022 Return

English Secondary/ Middle deemed Secondary Schools

applicable to 7.204 onwards

Handbook

Revision History

Version	Change Description	Date
7.204 - 1.0	Initial release.	03/03/2022

Doc Ref: SCSum_SE_7204/HBK/030322/AW

Providing Feedback on Documentation

We always welcome comments and feedback on the quality of our documentation including online help files and handbooks. If you have any comments, feedback or suggestions regarding the module help file, this handbook (PDF file) or any other aspect of our documentation, please email:

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Please ensure that you include the module name, version and aspect of documentation on which you are commenting.

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01 | Introduction

Overview

This handbook provides the information needed by Secondary/Middle deemed Secondary schools in England to complete the School Census Summer 2022 Return, which takes place on Thursday 19 May.

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. Autumn, Spring and Summer), which collect detailed information about school characteristics and student details, e.g. student 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 Secondary/Middle deemed Secondary schools in England for the School Census Summer 2022 Return is available in a later section of this handbook (please see *Preparing Data for the School Census Return* on page *6*).

> *NOTE: The content 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.*

How has the School Census Summer Return Changed?

Changes to the School Census Summer Return include the following:

School Census Summer 2022 Return Key Dates

- Census date 19/05/2022
- Attendance collected from 01/01/2022 to 17/04/2022
- Exclusions collected from 01/08/2021 to 17/04/2022
- Free School Meal collected from 21/01/2022 to 19/05/2022
- Alternative Provision Placements collected from 21/01/2022 to 19/05/2022
- Learner Support collected from 01/08/2021 to 19/05/2022
- Funding and Monitoring collected from 01/08/2021 to 19/05/2022.

Census Return Browser Information

The **Census Return** browser now includes the following information:

- **Census Communications** message box - the 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.
- Fileset - if a post-release fileset is imported, the import date is displayed in the browser.
- Consolidated database patch - if a post-release consolidated patch is applied, the patch ID and run date are displayed in the browser.

More Information:
Creating a New School Census Return on page *9*

Funding and Monitoring - New Panel

A read-only panel has been added to the **Census Return Details** page. The new **Funding and Monitoring** panel displays students with funding and monitoring information only.

The panel includes a **Recalculate** button, and an **Edit** button, which takes you to the **Update Funding and Monitoring** page (also available via the **Tools** menu).

More Information:
Editing Funding and Monitoring on page *21*

Funding and Monitoring - Updating

Tools | Statutory Return Tools | Update Funding and Monitoring

An additional column is provided on the **Update Funding and Monitoring** page to enable the total number of hours for the whole academic year to be entered. The value entered in this column must be greater than or equal to the cumulative hours at the summer census. The values entered in the **Total Hrs for the Acad Yr** column are not reported in the census.

Where the number of hours fail validation, the cell displays a red background and an explanation is displayed in the footer.

To deselect school-led tutoring, all of the existing hours must be removed for the selected student(s). Clicking the **Undo** button reverts the changes, if required.

Additional Resources:

Preparing for the School Census Summer 2022 guide

Funding and Monitoring - Recording Hours

Tools | Statutory Return Tools | Update Funding and Monitoring

It is now possible to record up to 999.99 hours in the following columns:

- Cumulative Hrs at Aut Census
- Cumulative Hrs at Spr Census
- Cumulative Hrs at Sum Census
- Total Hrs for the Acad Yr.

More Information:
Editing Funding and Monitoring on page *21*

Funding and Monitoring - Person Data Output Report

Routines | Data Out | Person Data Output

The following Funding and Monitoring data items have been added to the Person Data Output (PDO) report:

Year, school led tutoring, cumulative hours at Autumn, Spring and Summer, total hours for the academic year and notes.

Additional Resources:

Setting Up and Administering SIMS handbook

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**.

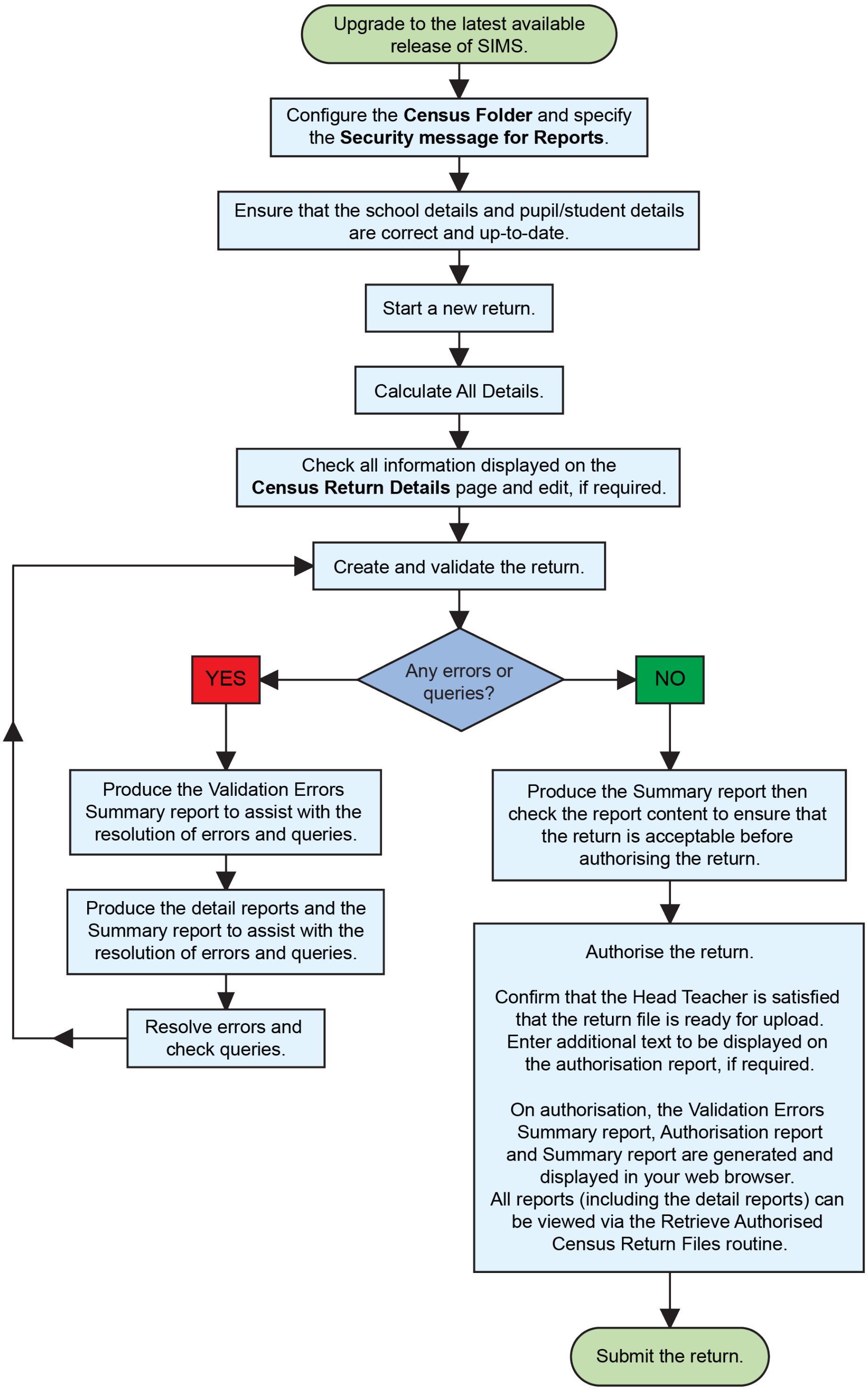
You are strongly advised to check the following SIMS Newsfeeds because they provide a range of explanatory text, presentations, videos and spreadsheets that you may find useful. These newsfeeds are updated regularly to provide the latest news and answers to enquiries. In particular, the newsfeeds for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

The SIMS Newsfeed - 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 2022
- SIMS Newsfeed - DfE CBDS 2021/22
- SIMS Newsfeed - Course Management for SIMS 7 Summer Release 2022
- SIMS Newsfeed - Series 2100 Filesets for SIMS 7 Summer Release 2022.

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.



02| Preparing for the School Census Summer Return

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. student 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 2022 Spring Release (7.204) 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 7.204 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 student level information is present and accurate in SIMS. For example, ensure that school details are correct, all new students 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 Secondary/Middle deemed Secondary schools for the School Census Summer 2022 Return.

School Level

Characteristics:

- LA number
- DfE establishment number
- school name, school phase and school type
- highest national curriculum year and lowest national curriculum year
- intake type
- governance
- school email address and telephone number.

Student Level

- Student Identifiers:
  - unique pupil number (UPN) and former UPN, unique learner number (ULN)
  - surname, forename, middle names, former surname, preferred surname
  - date of birth and gender.
- Student Characteristics:
  - first language
  - free school meal eligibility start date, end date and UK country in which the eligibility applies
  - school dinner taken (applicable to schools with students of the applicable age)
  - 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 (applicable to schools with students of the applicable age)
  - learner funding and monitoring type, code and hours
  - Youth Support Services Agreement (YSSA) indicator and Learner Support code.
- Status:
  - enrolment status
  - date of entry and date of leaving
  - part-time indicator
  - boarder indicator
  - actual national curriculum year group.
- Special Educational Needs:
  - SEN Provision
  - member of SEN unit (sometimes called special class) indicator
  - member of resourced provision indicator.
- Alternative Provision Placement (21/01/2022 to 19/05/2022):
  - unique reference number (URN)
  - UK provider register number (UKPRN)
  - setting type
  - placement reason
  - placement entry date
  - SEN provision at placement date of entry
  - placement leaving date
  - SEN provision at placement date of leaving
  - attendance pattern and sessions per week.

- Termly Exclusion Information (01/08/2021 to 17/04/2022):
  - exclusion category
  - reason for exclusion
  - SEN provision
  - exclusion start date
  - actual number of sessions excluded from.
- Home Information: Student's home address, including post code and unique property reference number (UPRN).
- Termly Attendance Information (01/01/2022 to 17/04/2022):
  - 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, sessions unable to attend due to Coronavirus.

For more information and instructions on all the preparations that need to be carried out before the census return is produced, please refer to the appropriate *Preparing for the School Census Summer 2022* 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**).

03| Producing the School Census Summer Return

Creating a New School Census Return

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

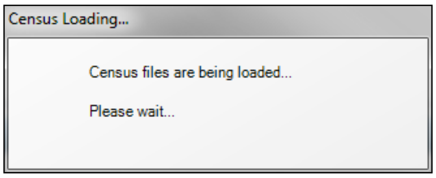
> ***IMPORTANT NOTE:*** *After upgrading to the SIMS 2022 Spring Release, select* ***Tools | Statutory Return Tools | Update Funding and Monitoring*** *to edit Funding and Monitoring hours data.*
>
> *Ensure that no red cells are displayed because this would prevent the census from being created.*

The School Census Summer 2022 Return collects data for:

- all students on the register on census day (19/05/2022).
- any additional students <u>not</u> on-roll on census day who:
  - had least one attendance session during the collection period from 01/01/2022 and 17/04/2022.
  - had exclusion that started between 01/08/2021 and 17/04/2022.
  - had funding and monitoring information between 01/08/2021 and 19/05/2022.
  - had an alternative provision placement between 21/01/2022 and 19/05/2022.
  - had Learner Support funding from 01/08/2021 to 19/05/2022.

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.

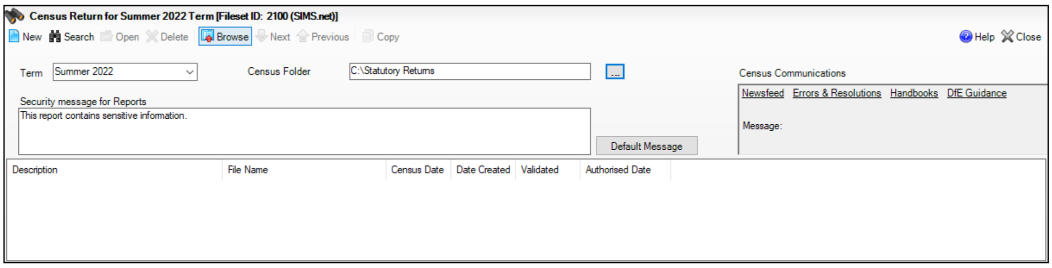


> *NOTE: The first time that* ***Routines | Statutory Returns | School Census*** *is selected during each SIMS session, there is a delay while the School Census files are loaded.*

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 2100 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 data fileset 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.*



By default, **Summer 2022** is displayed in the **Term** field.

> *TIP: To view a previous term (in the current academic year), select from the* ***Term*** *drop-down list, then click the* ***Search*** *button.*

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

More Information:

Deleting an Unauthorised Return on page *45*
Specifying the Security Message for Reports on page *12*

Configuring the Census Folder

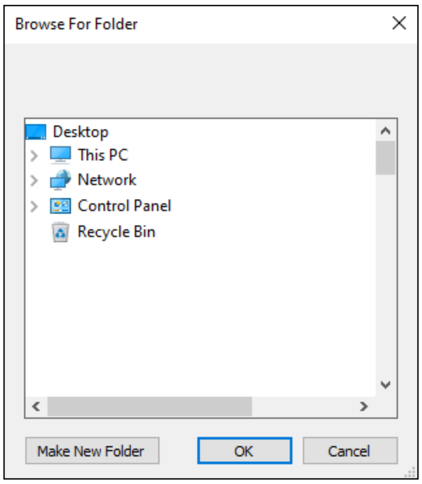
Before creating a return, the folder in which the return file will be saved must be specified.

> ***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 **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.

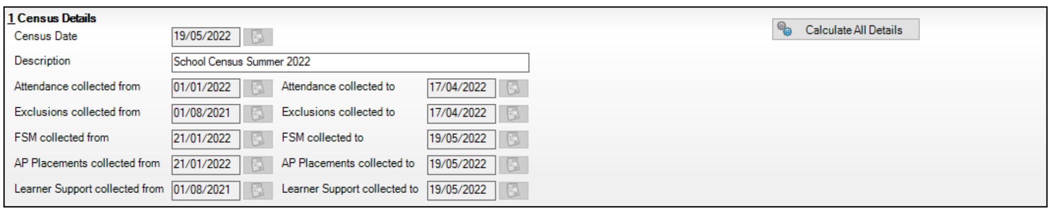
Editing Census Details

The **Census Details** panel displays the following read-only information:

- Census Date: 19/05/2022
- Attendance data collected from 01/01/2022 to 17/04/2022
- Exclusions data collected from 01/08/2021 to 17/04/2022

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

- FSM (Free School Meal) data collected from 21/01/2022 to 19/05/2022
- Alternative Provision Placements collected from 21/01/2022 to 19/05/2022
- Learner Support data collected from 01/08/2021 to 19/05/2022.



By default, the return **Description** is displayed as **School Census Summer 2022**.

1. Check the return **Description** and then edit, if required, e.g. to identify a dry run.

   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** 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.

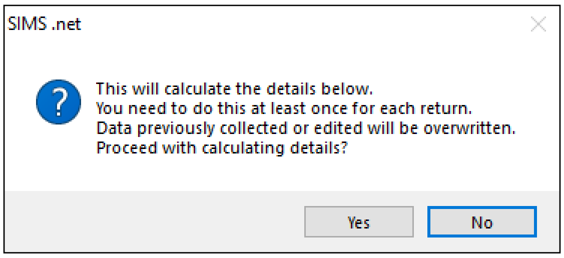
IMPORTANT NOTE: *You must calculate all details at least once to populate the various panels for each return.*

*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.



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

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

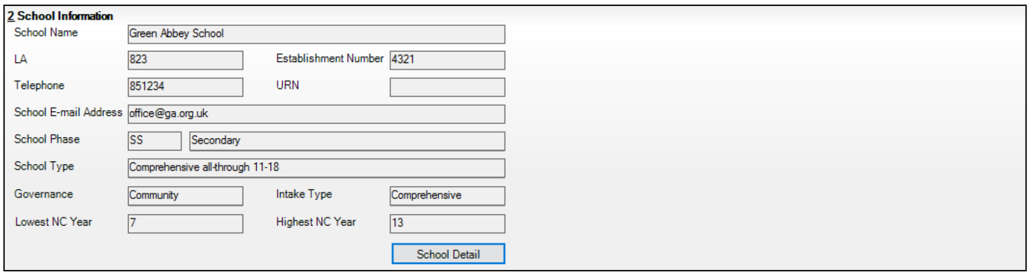
   The applicable panels on the **Census Return Details** page are then populated with data.

3. The return can be saved at any point by clicking the **Save** button.

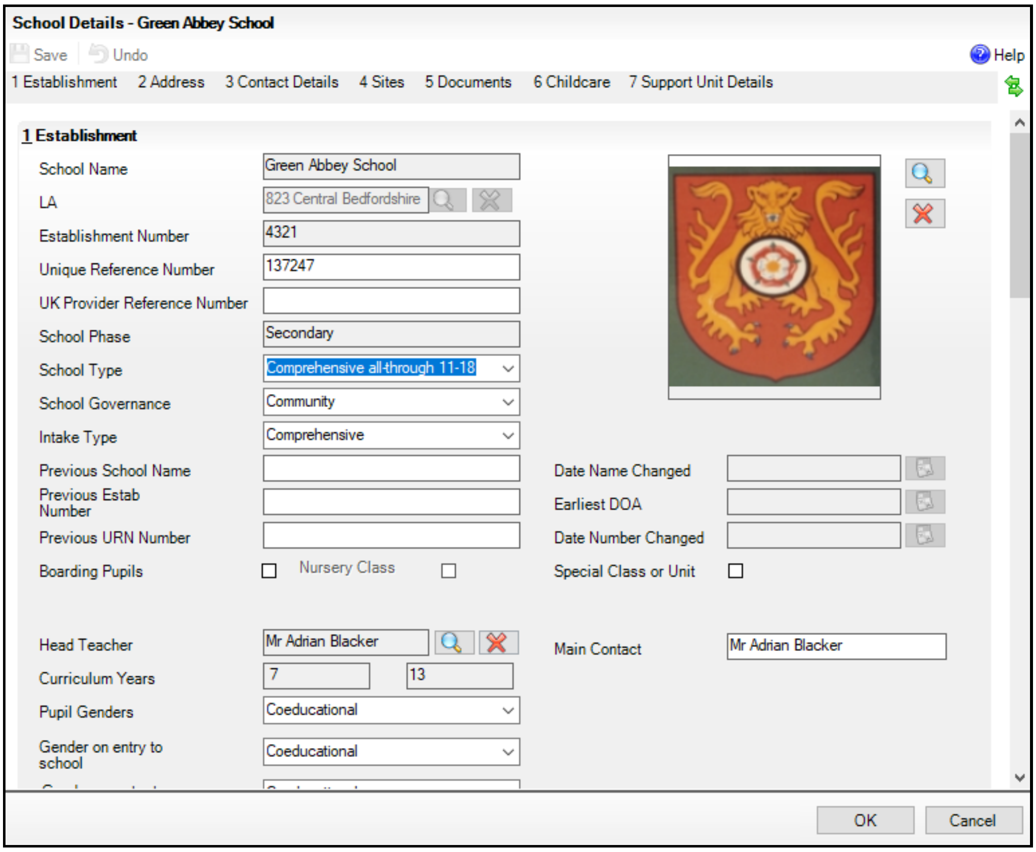
Editing School Information

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.



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.

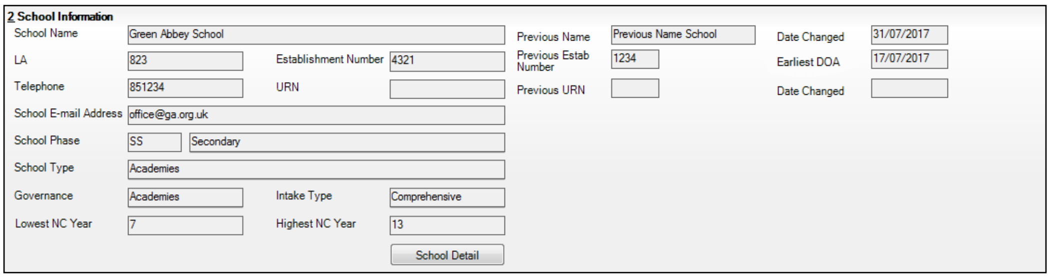


2. Add or amend the school details, selecting from the drop-down lists where applicable.

> *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**.

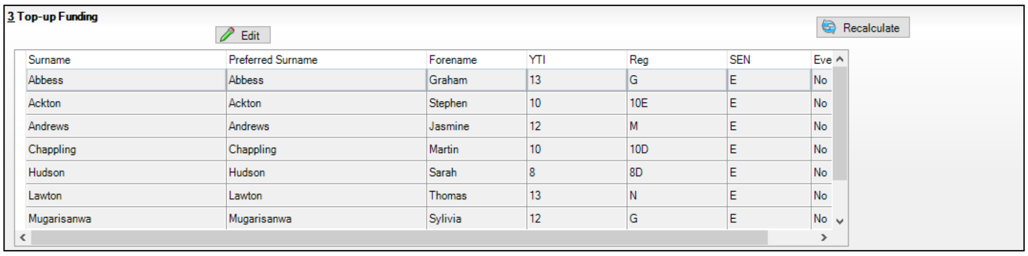
  This information is used by the School Workforce Census. For all types of Academies opened in the collection period, the date that the establishment's URN changed is used to determine when the academy was formed. Historical information is not collected from before the date the URN changed.

Editing Students 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 students.

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

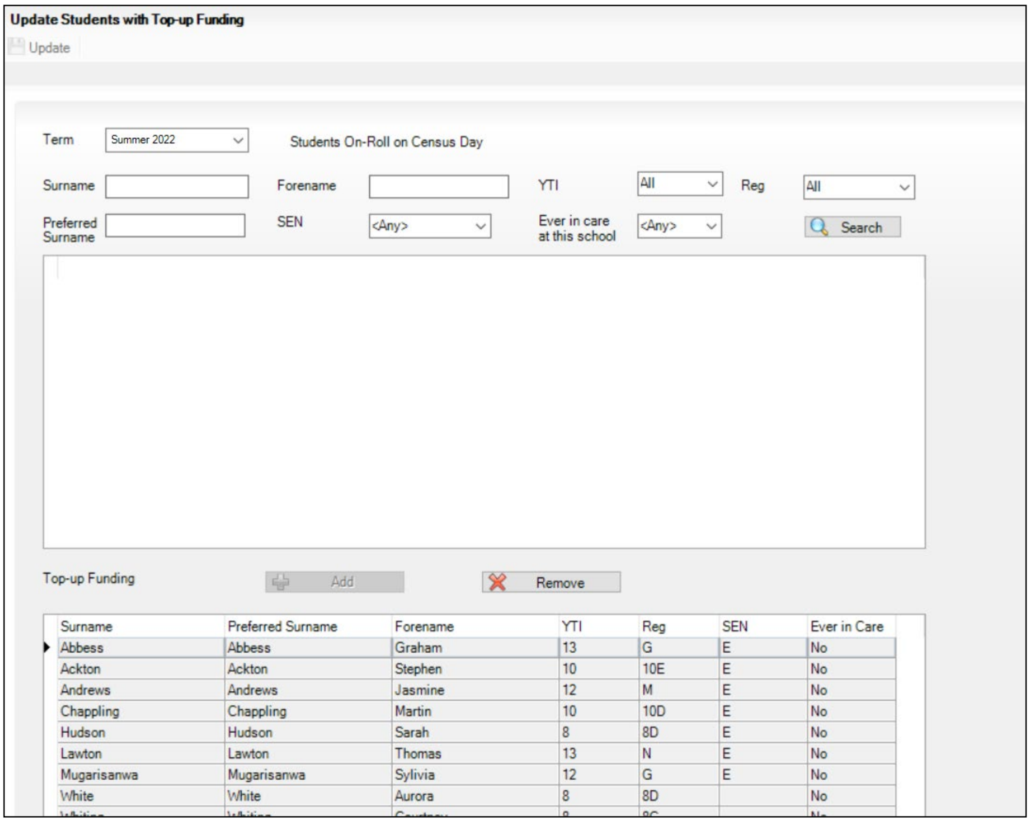
If the students with top-up funding have been recorded previously via **Tools | Statutory Return Tools | Update Top-Up Funding**, the data is displayed in the **Top-up Funding** panel.



Surname	Preferred Surname	Forename	YTI	Reg	SEN	Eve
Abbess	Abbess	Graham	13	G	E	No
Ackton	Ackton	Stephen	10	10E	E	No
Andrews	Andrews	Jasmine	12	M	E	No
Chappling	Chappling	Martin	10	10D	E	No
Hudson	Hudson	Sarah	8	8D	E	No
Lawton	Lawton	Thomas	13	N	E	No
Mugarisanwa	Mugarisanwa	Sylivia	12	G	E	No

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

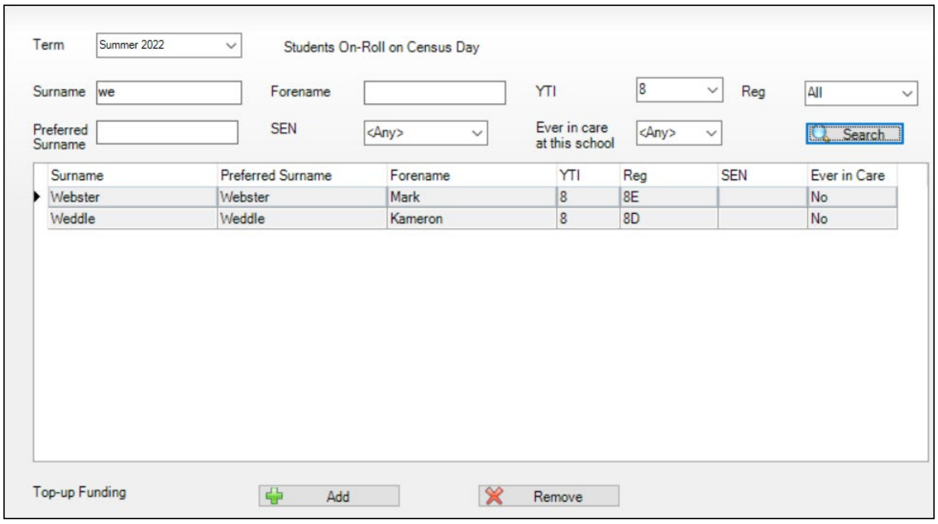
1. Click the **Edit** button to display the **Update Students with Top-up Funding** dialog. The students currently recorded as having top-up funding are displayed in the **Top-up Funding** list (located in the bottom half of the page).



Surname	Preferred Surname	Forename	YTI	Reg	SEN	Ever in Care
Abbess	Abbess	Graham	13	G	E	No
Ackton	Ackton	Stephen	10	10E	E	No
Andrews	Andrews	Jasmine	12	M	E	No
Chappling	Chappling	Martin	10	10D	E	No
Hudson	Hudson	Sarah	8	8D	E	No
Lawton	Lawton	Thomas	13	N	E	No
Mugarisanwa	Mugarisanwa	Sylivia	12	G	E	No
White	White	Aurora	8	8D		No

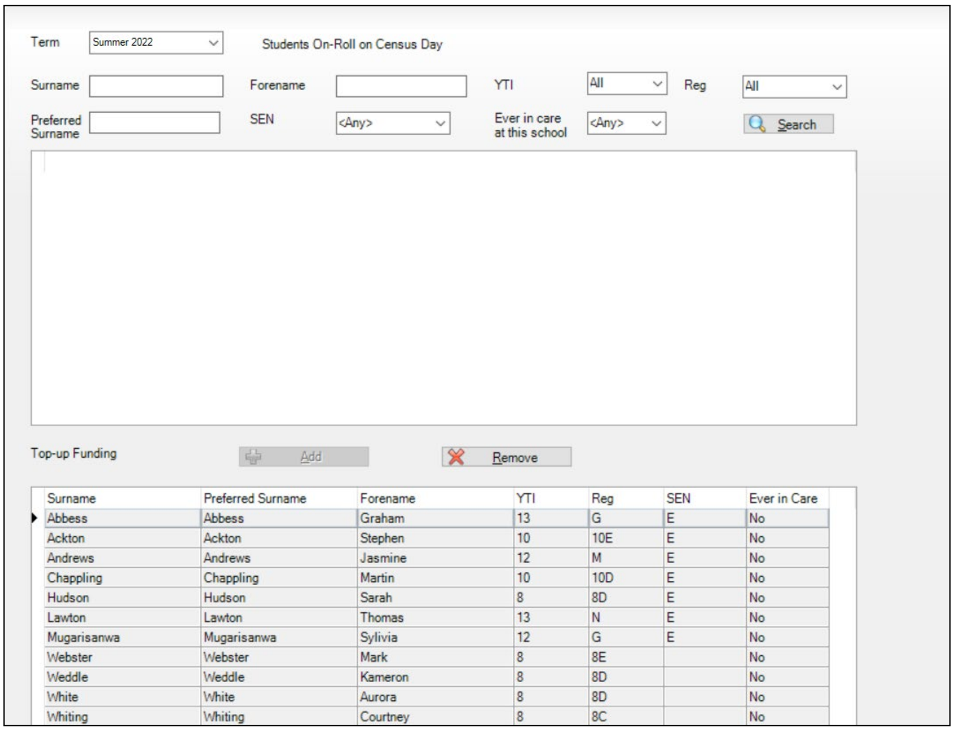
2. Use the **Students On-Roll on Census Day** search criteria to locate the additional students you wish to record as having top-up funding.

   > *TIP: Click the **Search** button to display a list of all students 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.*



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

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



4. To remove a student from the **Top-up Funding** list, highlight the required student, then click the **Remove** button. The student'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 students 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:

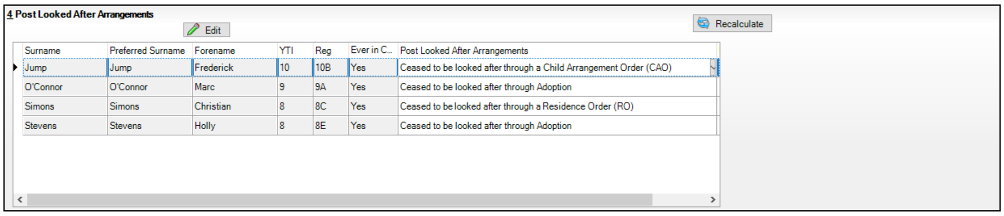
Preparing for the School Census Summer 2022 Return guide

Editing Student Post Looked After Arrangements

The Post Looked After Arrangements routine provides schools with the ability to record whether students 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.

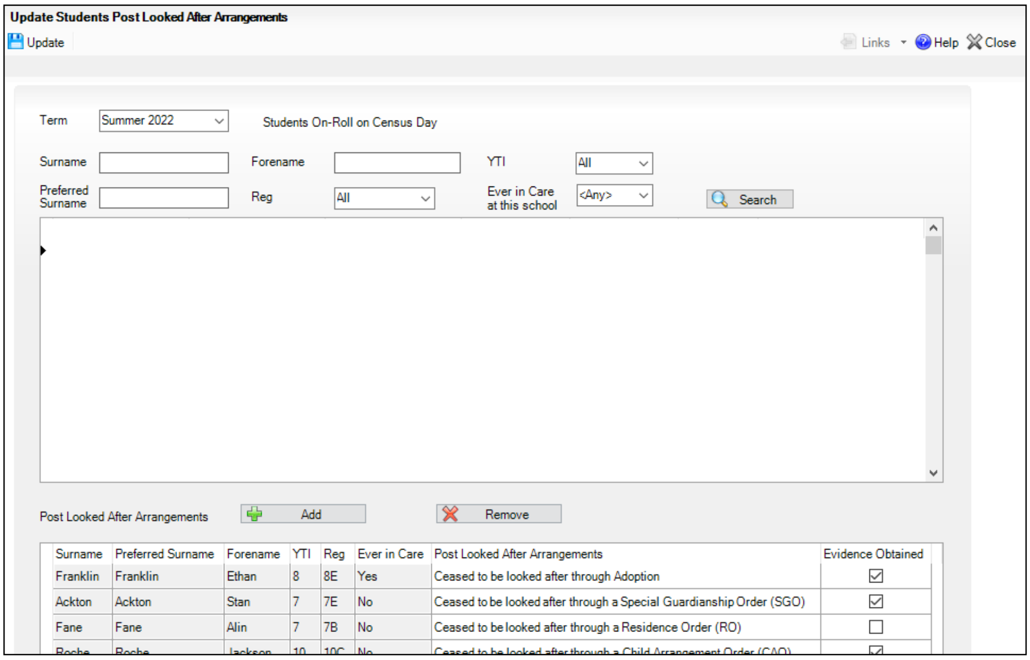
If the students with post looked after arrangements (PLAA) have been recorded previously via **Tools | Statutory Return Tools | Update Student Post Looked After Arrangements**, the data is displayed in the **Post Looked After Arrangements** panel.

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



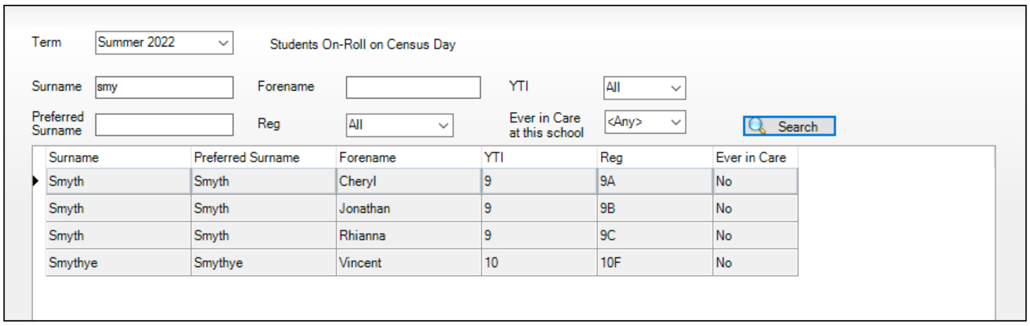
The information displayed in the **Post Looked After Arrangements** panel is read-only. Updating the information, e.g. editing the PLAA status or adding a student, must be done via the **Edit** button.

2. Click the **Edit** button to display the **Update Students Post Looked After Arrangements** page. Any students currently recorded as having PLAA are displayed in the **Post Looked After Arrangements** list located in the bottom half of the page.



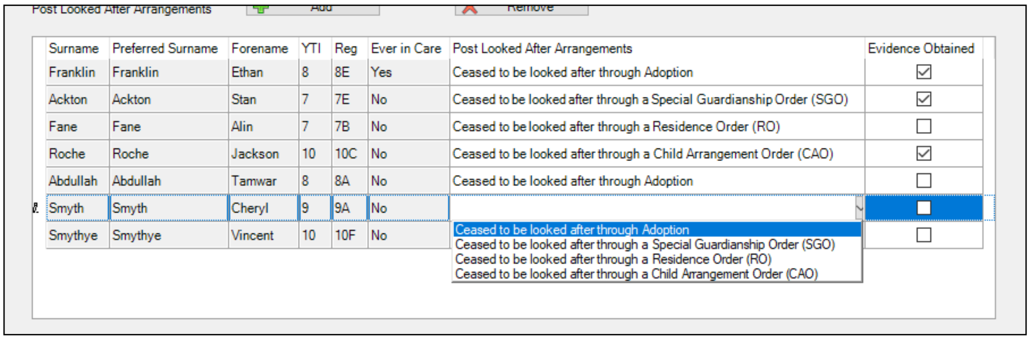
3. Use the **Students On-Roll on Census Day** search criteria to locate the additional students you wish to record as having PLAA.

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



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

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



5. For each student added to the **Post Looked After Arrangements** list, select the post looked after arrangement status by clicking in the applicable cell in the **Post Looked After Arrangements** column, then selecting the required status from the drop-down list:

   - **Ceased to be looked after through Adoption**
   - **Ceased to be looked after through a Special Guardianship Order (SGO)**
   - **Ceased to be looked after through a Residence Order (RO)**
   - **Ceased to be looked after through a Child Arrangement Order (CAO)**.

   *NOTE: **Ceased to be looked after through a Residence Order** (**RO**) has been replaced by **Ceased to be looked after through a Child Arrangement Order** (**CAO**).*

   You do not need to change any existing residence orders but new post looked after arrangements must be recorded as child arrangement orders.

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 students 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 2022 Return guide

More Information:

Post Looked After Arrangements Report on page *36*

Editing Funding and Monitoring

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

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 students:

- Student in receipt of school-led tutoring programme: Applicable to all schools (except Nursery schools), with the appropriate year groups or age groups, i.e. pre-16. For students in National Curriculum Year Actual 1 to 11, or aged 5 to 15 as at 31/08/2021 in National Curriculum Year Actual 'X' for special schools. (Funding and Monitoring code = **01**.)
- Student in receipt of 16 to 19 tuition fund: Applicable to Secondary, All-Through and Pupil Referral Units or Alternative Provision schools with a sixth form. For students in National Curriculum Year Actual 12 and above with current single registration (**C**) or current main dual registration (**M**). Pupil Referral Units or Alternative Provision for any student with the following enrolment status: **C**, **M**, **F** or **O**. (Funding and Monitoring code = **21**.)
- Student repeating up to one full final year of 16 to 19 funded provision: Applicable to Secondary, All-Through and Pupil Referral Units or Alternative Provision schools with a sixth form. For students in National Curriculum Year Actual 13 and above with current single registration (**C**) or current main dual registration (**M**). Pupil Referral Units or Alternative Provision for any student with the following enrolment status: **C**, **M**, **F** or **O**. (Funding and Monitoring code = **22**.)

Detailed guidance about the expectations and conditions attached to school-led tutoring funding is available on the GOV.UK website (https://www.gov.uk/government/publications/school-led-tutoring-conditions-of-grant).

What Data should be entered?

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

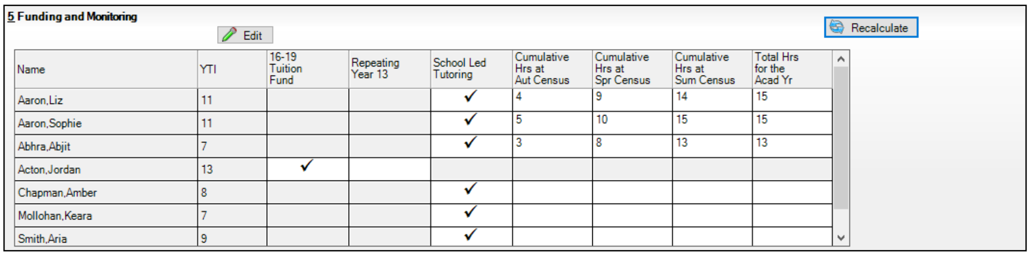
The following table describes the values that should be entered in each 'hours' column.

	Cumulative Hrs at Aut Census	Cumulative Hrs at Spr Census	Cumulative Hrs at Sum Census	Total Hrs for the Acad Yr
Description of expected values	All hours of tutoring from 01/08/2021 to the Autumn census date (04/10/2021).	All hours of tutoring from 01/08/2021 to the Spring census date (20/01/2022). The number of hours entered must be greater than or equal to the Autumn hours.	All hours of tutoring from 01/08/2021 to the Summer census date (19/05/2022). The number of hours entered must be greater than or equal to the Spring hours.	All hours of tutoring from 01/08/2021 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 01/08/2021 to 04/10/2021.	Three hours received after 04/10/2022 to 20/01/2022.	Two hours received after 20/01/2022 to 19/05/2022.	One additional hour after 19/05/2022 to 31/07/2022. 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.

Checking and Updating 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.


5 Funding and Monitoring

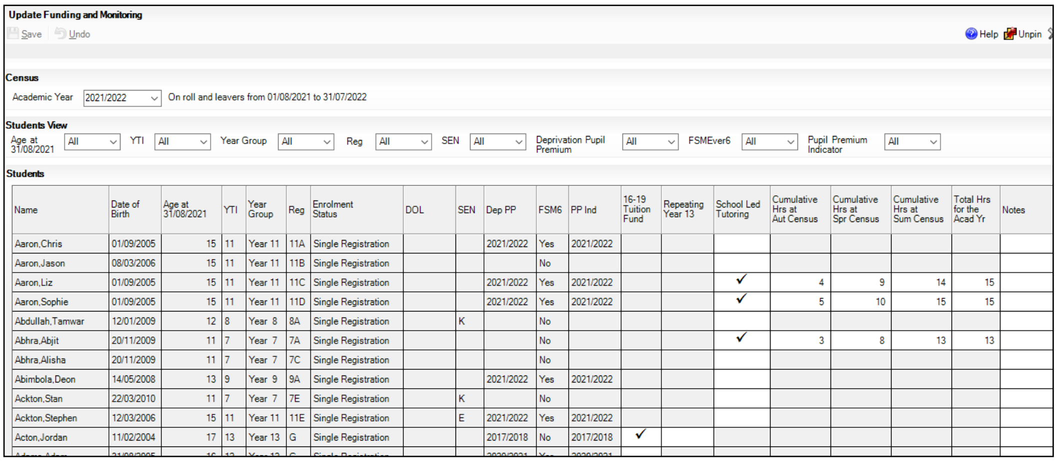
Edit

Recalculate

Name	YTI	16-19 Tuition Fund	Repeating Year 13	School Led Tutoring	Cumulative Hrs at Aut Census	Cumulative Hrs at Spr Census	Cumulative Hrs at Sum Census	Total Hrs for the Acad Yr
Aaron,Liz	11			✓	4	9	14	15
Aaron,Sophie	11			✓	5	10	15	15
Abhra,Abjit	7			✓	3	8	13	13
Acton,Jordan	13	✓						
Chapman,Amber	8			✓				
Mollohan,Keara	7			✓				
Smith,Aria	9			✓				

> *NOTE: Only students 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.



Name	Date of Birth	Age at 31/08/2021	YTI	Year Group	Reg	Enrolment Status	DOL	SEN	Dep PP	FSM6	PP Ind	16-19 Tuition Fund	Repeating Year 13	School Led Tutoring	Cumulative Hrs at Aut Census	Cumulative Hrs at Spr Census	Cumulative Hrs at Sum Census	Total Hrs for the Acad Yr	Notes
Aaron,Chris	01/09/2005	15	11	Year 11	11A	Single Registration			2021/2022	Yes	2021/2022								
Aaron,Jason	08/03/2006	15	11	Year 11	11B	Single Registration				No									
Aaron,Liz	01/09/2005	15	11	Year 11	11C	Single Registration			2021/2022	Yes	2021/2022			✓	4	9	14	15	
Aaron,Sophie	01/09/2005	15	11	Year 11	11D	Single Registration			2021/2022	Yes	2021/2022			✓	5	10	15	15	
Abdullah,Tamwar	12/01/2009	12	8	Year 8	8A	Single Registration		K		No									
Abhra,Abjit	20/11/2009	11	7	Year 7	7A	Single Registration				No				✓	3	8	13	13	
Abhra,Alisha	20/11/2009	11	7	Year 7	7C	Single Registration				No									
Abimbola,Deon	14/05/2008	13	9	Year 9	9A	Single Registration			2021/2022	Yes	2021/2022								
Ackton,Stan	22/03/2010	11	7	Year 7	7E	Single Registration		K		No									
Ackton,Stephen	12/03/2006	15	11	Year 11	11E	Single Registration		E	2021/2022	Yes	2021/2022								
Acton,Jordan	11/02/2004	17	13	Year 13	G	Single Registration			2017/2018	No	2017/2018	✓							

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

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

   Cells with a white background are editable.
4. Right-click anywhere in the **16-19 Tuition Fund** column, then select the required option from the pop-up menu.
   a. If most or all of the students have been receiving tuition funding, select the **Check All** option.
   b. Any students who have not been receiving tuition funding can then be deselected by clicking the **16-19 Tuition Fund** cell adjacent to their name.
5. Specify which students are **Repeating Year 13** by right-clicking anywhere in the column, then selecting the required option from the pop-up menu.

   Bulk or Individual entry can be achieved using the same method as described for 16-19 tuition funding.

   Selecting the Repeating Year 13 option creates two programme aims, one for the completed study programme and one for the repeating year. This can be checked by running the Post-16 Programmes of Study and Learning Aims report via the **Census Return Details** page.

6. Right-click anywhere in the **School Led Tutoring** column, then select the required option from the pop-up menu.
   a. If most or all of the students have been receiving school-led tutoring, select the **Check All** option.
   b. Any students who have not been receiving school-led tutoring can then be deselected by clicking the **School Led Tuition** cell adjacent to their name.
7. When a tick is entered in a **School Led Tutoring** cell, the corresponding 'cumulative hour' cells are then editable. The number of tutoring hours (to the nearest 0.5) that the student has received as at the applicable census date should be entered.

   IMPORTANT NOTE: *To deselect school-led tutoring, all of the existing hours must be removed for the selected student(s). Clicking the* ***Undo*** *button reverts the changes, if required.*

8. In the **Total Hrs for the Acad Yr** column, enter the total number of school led tutoring hours for the whole academic year. 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 ***Total Hrs for the Acad Yr*** *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/organisations/education-and-skills-funding-agency).*

9. Enter **Notes**, if required. This information is for your school's use and is not collected in the census.
10. 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-2021-to-2022#learner-funding-and-monitoring-fam).

Entering Attendance Information

Termly attendance data (including attendance codes and the number of sessions missed) should be provided for non-boarder students and leavers aged four to 15 inclusive on 31/08/2021, who were on-roll for at least one session during the collection period from 01/01/2022 to 17/04/2022.

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

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

SIMS Attendance/Lesson Monitor Users

If SIMS Attendance/Lesson Monitor 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.

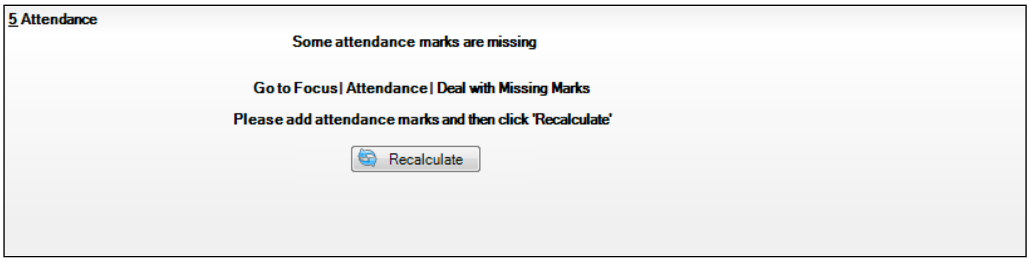
*TIP: After the Create and Validate process is run, the Attendance detail report can be used to assist with the checking of attendance data. Select **Attendance Report** from the **Detail Report** drop-down list.*

Are your Attendance Codes DfE Compliant?

If Attendance/Lesson Monitor 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/Lesson Monitor, 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.

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.



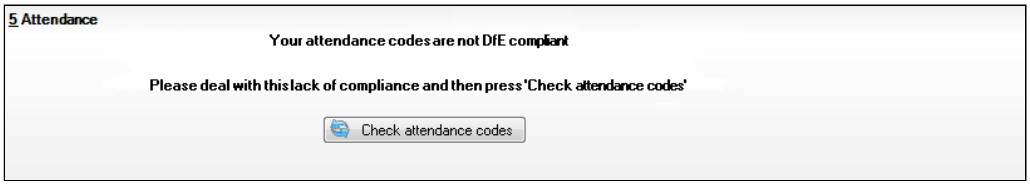
1. Use the Deal with Missing Marks routine (**Focus | Attendance** (or **Lesson Monitor**) **| Deal with Missing Marks**) to locate the missing marks and enter appropriate attendance codes.
2. Return to the **Census Return Details** page and click the **Check missing marks** button in the **Attendance** 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 *32*

Are your Attendance Codes DfE Non-Compliant?

If Attendance/Lesson Monitor 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.



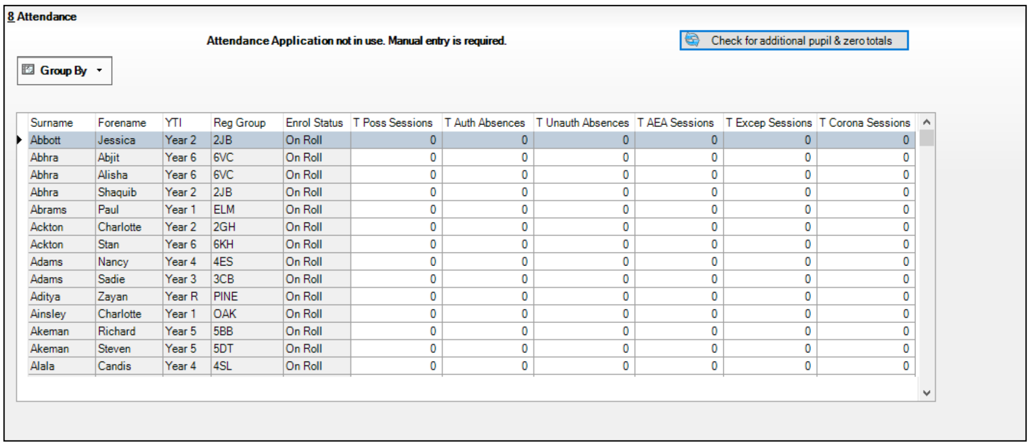
1. Non-compliant codes must be dealt with. Please contact your Local Support Unit for assistance.
2. Click the **Check attendance codes** button to check that DfE attendance codes are now in use.

   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/Lesson Monitor Not in Use

If Attendance/Lesson Monitor 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**)
- Total number of sessions unable to attend due to Coronavirus (**T Corona Sessions**).



1. To filter the display of students 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 students.
2. To sort the displayed data by surname, forename, year group, registration group or enrolment status, click the appropriate column header.
3. For each student, enter the correct attendance numbers in the appropriate columns.
4. To clear the attendance information and check for additional students, 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

Creating and Validating the School Census Return

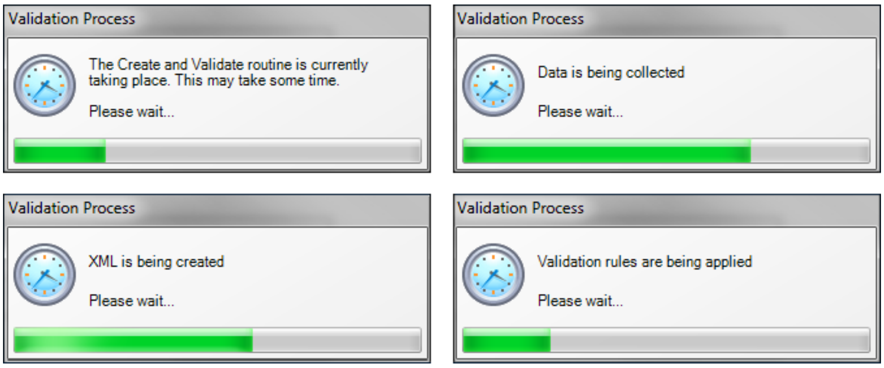
A return must be created, validated and authorised before it can be sent to your Local Authority or uploaded to the DfE COLLECT data collection website (as applicable to your school).

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 students 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 students at your school.

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



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:

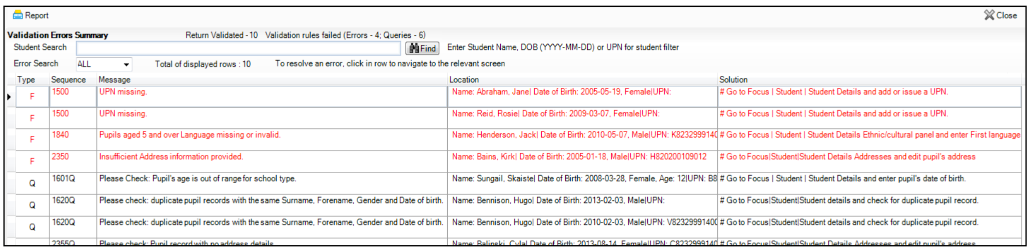
Dealing with Missing Marks section in the *Edit Marks Routine* chapter of the *Managing Pupil/Student Attendance* handbook or the *Monitoring Session and Lesson Attendance* handbook

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=KB0050590).

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.



The **Validation Errors Summary** panel header displays the number of errors and queries found when the Create and Validate routine was run. A student 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 student.
  a. Enter all or part of a UPN, student'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 (please see *Transferring Report Data to a Spreadsheet via Internet Explorer* on page *39*).

  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 | Student | Bulk Update**). For more information, please refer to the *Managing Pupil/Students* handbook.

More Information:
Transferring Report Data to a Spreadsheet via Internet Explorer on page *39*

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 Students** 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 student'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: Students on-roll on census day.

Where applicable, this report provides the following information about students who are on-roll on census day: UPN, ULN, legal surname, legal forename, preferred surname, former surname, date of birth (DOB), gender, year taught in (YTI), date of admission (DOA), enrolment status, language, Youth Support Services Agreement (YSSA) status, part-time status and boarder indicator.

> *NOTE: Where a student is in a year group that is different to that expected (based on their date of birth), the applicable **Year Taught In** cell is highlighted in yellow.*

Leavers Basic Details Report

Report Criteria: Students not on-roll on census day who were:

- Leavers with attendance (01/01/2022 to 17/04/2022)
- Leavers with exclusions (01/08/2021 to 17/04/2022)
- Leavers with learner support of Vulnerable Group Bursary Awarded or Discretionary Bursary Awarded (01/08/2021 - 19/05/2022)
- Leavers with funding and monitoring (01/08/2021 to 19/05/2022)
- Leavers with alternative provision (21/01/2022 to 19/05/2022).

The Leavers Basic Details report provides the following information, where applicable: UPN, ULN, former UPN, legal surname, legal forename, middle names, former surname, date of birth (DOB), gender, date of admission (DOA), date of leaving (DOL), language, part-time status, boarder indicator, attendance, exclusions, and Learner Support.

> *NOTE: Students are only included in the return as leavers if they have attendance, exclusions, learner support, funding and monitoring or alternative provision data that falls within the collection period.*

Exclusions Report

Report Criteria: Students with exclusions from 01/08/2021 to 17/04/2022:

- On-roll students and leavers
- Suspensions (excluding lunchtime suspensions) starting from 01/08/2021 to 17/04/2022
- Permanent exclusions from 01/08/2021 to 17/04/2022.

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

The following details about students 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 student was excluded, SEN provision and on-roll status.

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

Attendance Report

Report Criteria: Students with attendance one term ago (01/01/2022 to 17/04/2022). On-roll students and leavers (not boarders) aged four to 15 at 31/08/2021.

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

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

- Attendance/Lesson Monitor in Use:
  - termly sessions possible
  - on-roll status
  - present codes
  - approved education activity codes
  - absence codes (divided into authorised and unauthorised sessions)
  - attendance not required codes.
- Attendance/Lesson Monitor <u>Not</u> in Use:
  - sessions possible
  - authorised absence sessions
  - unauthorised absence sessions
  - sessions approved educational activity (AEA)
  - sessions exceptional
  - sessions Coronavirus
  - On Roll Status.

Absentees Report

Report Criteria: On-roll students and leavers (but not boarders) who have an absence rate of 10% or above, with attendance one term ago (01/01/2022 to 17/04/2022), who were aged four to 15 at 31/08/2021.

An individual student'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 students 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 student with SEN Provision/Status **E** (Education, Health and Care Plan) or **K** (SEN Support).

This report provides a list of students 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, member of resourced provision indicator and on-roll status.

Address Details Report

Report Criteria: Students on-roll on census day.

This report provides a list of students, 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.

Free School Meal Eligibility Report

Report Criteria: On-roll students on census day who were eligible for free school meals on or after 21/01/2022 and up to census day.

This report provides information on free school meal eligibility for students 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.

Learner Support Report

Report Criteria: On-roll students and leavers aged 16 plus at 31/08/2021 who have been awarded Vulnerable Group and/or Discretionary Bursary funding from 01/08/2021 to 19/05/2022.

This report provides information about the applicable students: UPN, legal surname, legal forename, date of birth (DOB), gender, year taught in (YTI), learner support and on-roll status.

Top-up Funding Report

Report Criteria: On-roll students 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

Report Criteria: On-roll students and leavers with funding and monitoring information for the collection period 01/08/2021 to 19/05/2022.

The report provides the following student 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 (all hours of tutoring from 01/08/2021 to 19/05/2022) and on-roll status.

Funding and Monitoring key to codes:

01 = Student in receipt of school-led tutoring programme

21 = Student in receipt of 16 to 19 tuition fund

22 = Student is repeating up to one full final year of 16 to 19 funded provision.

The code(s) displayed in the report vary depending on your school phase.

Additional Resources:

Preparing for the School Census Summer 2022 Return guide

Post Looked After Arrangements Report

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

The report provides the following information about students 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.

Permanent Exclusions without Final Review Report

Report Criteria: On-roll students and leavers with permanent exclusions and without a final review from 01/01/2021 to 17/04/2022.

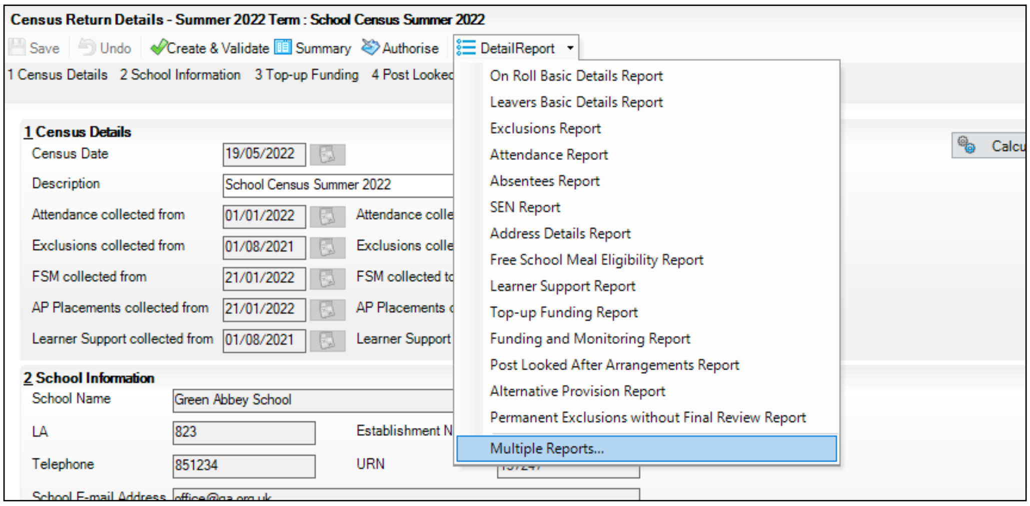
NOTE: The date range for this report does not match the collection dates for the school census. This is intentional to enable all instances of permanent exclusions without final review to be checked.

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.

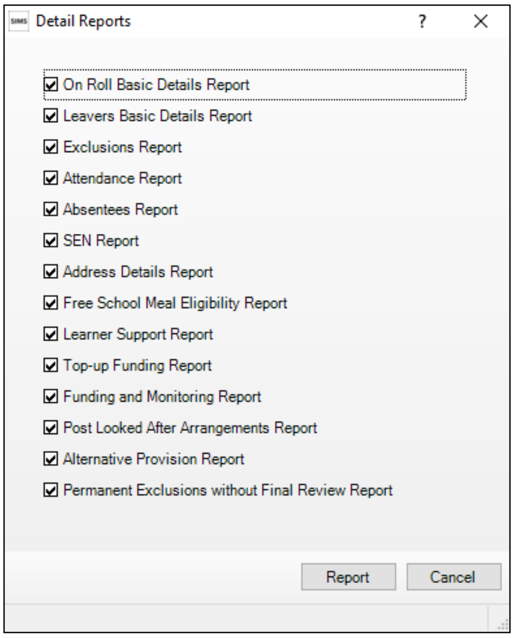
The following information is included in the report: UPN, legal surname, legal forename, date of birth (DOB), gender, date of admission (DOA), date of leaving (DOL), reason for exclusion, exclusion start date, SEN expert requested (Yes/No) and on-roll status.

Generating Detail Reports

To select 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 and displayed in your web browser.



To select several detail reports, select **Multiple Reports** from the **Detail Report** drop-down list to display the **Detail Reports** dialog.



By default, all detail reports are selected. If any reports are not required, deselect the associated check box. Click the **Report** button to generate the selected reports.

The report(s) are displayed in your web browser from where the data can be transferred to a spreadsheet, if required.

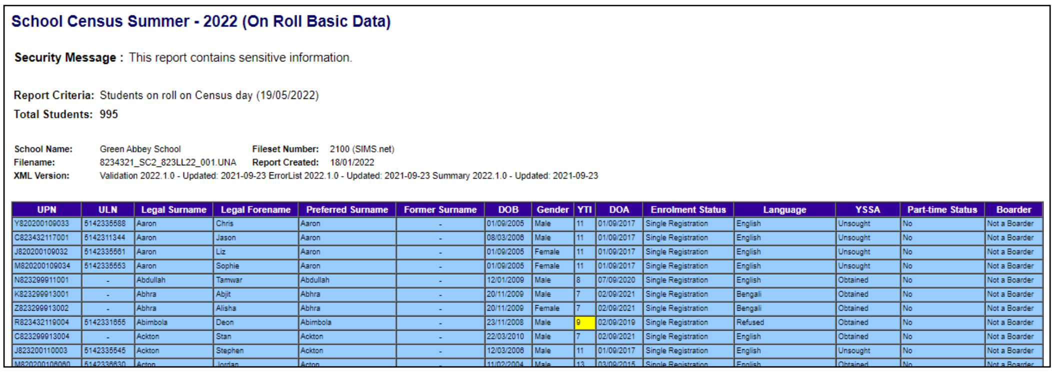
The report(s) are saved automatically in the folder specified in the **Census Return** browser, e.g. `S:\SCHOOL CENSUS`. For guidance on navigating to files on your local workstation when you are working in a Hosted environment, please contact your System Manager or local Support.

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

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

For example:
`8234321_SC2_823LL22_001_onroll_pupil_basic_details_report.html`.

The following graphic shows an example of an On Roll Basic Details report:



School Census Summer - 2022 (On Roll Basic Data)

Security Message : This report contains sensitive information.

Report Criteria: Students on roll on Census day (19/05/2022)
Total Students: 995

School Name: Green Abbey School **Fileset Number:** 2100 (SIMS.net)
Filename: 8234321_SC2_823LL22_001.UNA **Report Created:** 18/01/2022
XML Version: Validation 2022.1.0 - Updated: 2021-09-23 ErrorList 2022.1.0 - Updated: 2021-09-23 Summary 2022.1.0 - Updated: 2021-09-23

UPN	ULN	Legal Surname	Legal Forename	Preferred Surname	Former Surname	DOB	Gender	YTI	DOA	Enrolment Status	Language	YSSA	Part-time Status	Boarder
Y820200109033	5142335588	Aaron	Chris	Aaron	-	01/09/2005	Male	11	01/09/2017	Single Registration	English	Unsought	No	Not a Boarder
C823432117001	5142311344	Aaron	Jason	Aaron	-	08/03/2006	Male	11	01/09/2017	Single Registration	English	Unsought	No	Not a Boarder
J820200109032	5142335561	Aaron	Liz	Aaron	-	01/09/2005	Female	11	01/09/2017	Single Registration	English	Unsought	No	Not a Boarder
M820200109034	5142335553	Aaron	Sophie	Aaron	-	01/09/2005	Female	11	01/09/2017	Single Registration	English	Unsought	No	Not a Boarder
N823299911001	-	Abdullah	Tamwar	Abdullah	-	12/01/2009	Male	8	07/09/2020	Single Registration	English	Obtained	No	Not a Boarder
K823299913001	-	Abhra	Abjit	Abhra	-	20/11/2009	Male	7	02/09/2021	Single Registration	Bengali	Obtained	No	Not a Boarder
Z823299913002	-	Abhra	Alisha	Abhra	-	20/11/2009	Female	7	02/09/2021	Single Registration	Bengali	Obtained	No	Not a Boarder
R823432119004	5142331655	Abimbola	Deon	Abimbola	-	23/11/2008	Male	9	02/09/2019	Single Registration	Refused	Obtained	No	Not a Boarder
C823299913004	-	Ackton	Stan	Ackton	-	22/03/2010	Male	7	02/09/2021	Single Registration	English	Obtained	No	Not a Boarder
J823200110003	5142335545	Ackton	Stephen	Ackton	-	12/03/2006	Male	11	01/09/2017	Single Registration	English	Unsought	No	Not a Boarder
M820200106060	5142336630	Acton	Jordan	Acton	-	11/02/2004	Male	13	03/09/2015	Single Registration	English	Obtained	No	Not a Boarder

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

More Information:
Configuring the Census Folder on page *11*
Transferring Report Data to a Spreadsheet via Internet Explorer on page *39*

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.

Transferring Report Data to a Spreadsheet via Internet Explorer

Transferring a report to a spreadsheet application enables the data to be sorted, the column order to be changed, etc.

With the generated report displayed in your web browser, right-click the report and then select **Export to Microsoft Excel** from the drop-down list.

> ***IMPORTANT NOTE:*** *The spreadsheet contains the same level of sensitive information as the original HTML report from which the information was transferred. Therefore, the spreadsheet file must be saved to a folder with the same level of security.*

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

When the return is authorised, the Summary report is automatically generated and displayed in your web browser. However, the report can be run at any time after the return is created and validated.

Click the **Summary** button located at the top of the **Census Return Details** page. The report is automatically displayed in your web browser but can be transferred to a spreadsheet, if required.

The report is saved automatically in the folder specified in the **Census Return** browser, e.g. `S:\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 is made up of the following data fields separated by underscores ('_'):

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

For example: `8234321_SC2_823LL22_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/DfE might request a copy of the Summary report (which is automatically generated when the return is authorised) to be signed by the Head Teacher and sent to the LA/DfE when the return has been authorised.

More Information:

Configuring the Census Folder on page *11*
Generating Detail Reports on page *37*
Transferring Report Data to a Spreadsheet via Internet Explorer on page *39*
Authorising the Return on page *41*
Deleting an Unauthorised Return on page *45*

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 *11*
Specifying the Security Message for Reports on page *12*
Resolving Validation Errors and Checking Queries on page *30*
Producing Detail Reports on page *32*
Producing the Summary Report on page *39*

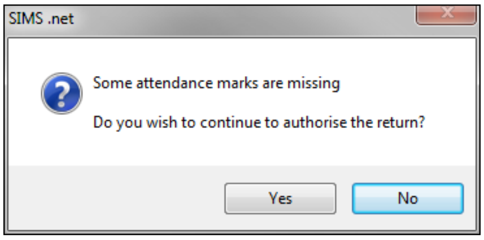
Authorising the Return

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.

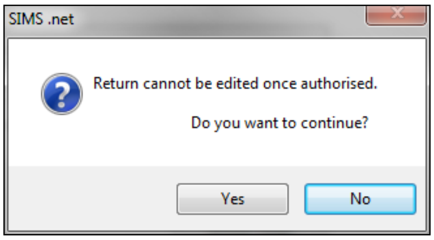
1. Click the **Authorise** button

   If missing marks exist, the following message is displayed.



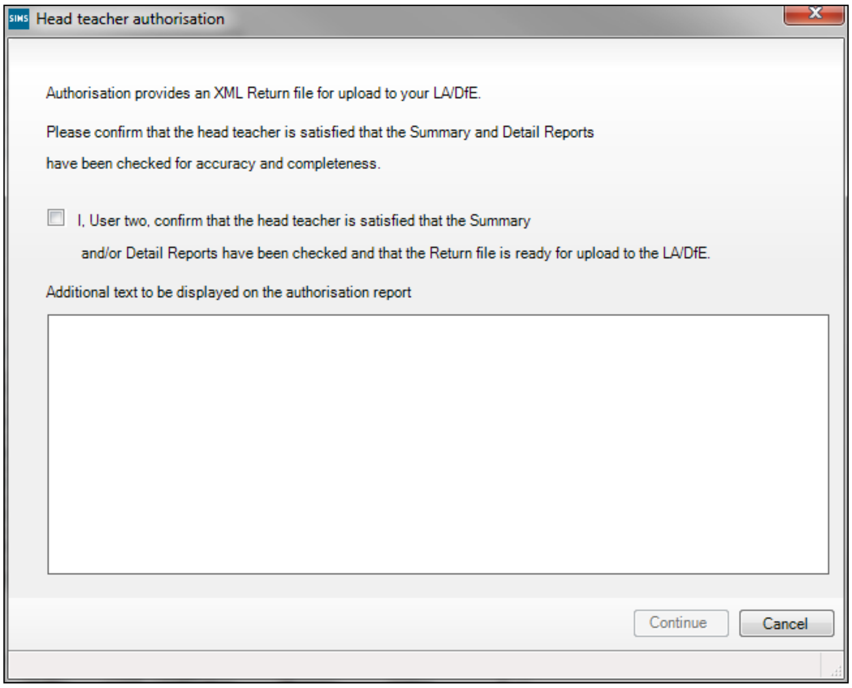
2. Click the **Yes** button to continue with the authorisation process or the **No** button if you want to return to SIMS where the missing marks can be entered.

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



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.



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 2022 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 *39*
Retrieving Authorised Census Return Files on page *43*
Copying a Return on page *44*

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.*

More Information:

Configuring the Census Folder on page *11*
Copying a Return on page *44*

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* <u>*not*</u> *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* <u>*must*</u> *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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