



SIMS



**Independent
Junior/Preparatory
School End of Year
Procedures**

**for the academic year
2021/2022**

Revision History

Version	Change Description	Date
2021/2022 - 1.0	Initial release.	10/04/2021

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Providing Feedback on Documentation

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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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Overview

IMPORTANT NOTE: *The processes described in this document remain the same each year; they are not specific to a single academic year. The main changes made to this document each year relate to the graphical examples and the sample dates provided in graphics and in the body of the text.*

In future years, if you wish to start your preparations for the next academic year before an updated End of Year Procedures document is made available, you can use the document prepared for the previous year as a guide, remembering to replace the sample dates with those applicable for your school in the forthcoming academic year.

This document describes the steps that should be followed to enable a successful transition from one academic year to another. It includes the creation of a new academic year, setting up next year's registration groups and year groups, etc. together with the promotion of pupils from one year into the next.

It is applicable to Independent Primary school users. Independent Senior or multi-tiered SIMS users should refer to the *Independent Senior School End of Year Procedures*, available from the support portal (https://support.capitasoftware.com/csm?id=kb_article_view&sysparm_article=KB0036819). Preparatory schools that use Nova-T6 should also refer to the *Independent Senior School End of Year Procedures*.

WARNING: *You must complete these procedures before the start of the new academic year. It is critical that the new academic year is created and promotion routines run before the old year ends. These processes determine the year groups and registration groups into which pupils are placed in the new academic year. We therefore suggest you start these processes as early as possible, allowing sufficient time to complete by the start of the new academic year.*

Setting Permissions

The permissions required to carry out the various end of year processes vary. However, users who are members of the School Administrator and Admissions Officer user groups in System Manager can carry out all the functions in this document. Please consult your System Administrator if you are unsure whether you have the required permissions.

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 and then select the document you require.

End of Year Procedure Check List

This section provides a check list of all the actions that form part of the end of year process.

Complete	Description/Task
<input type="checkbox"/>	Record changes to teaching staff in Personnel (please see <i>Recording Changes to Teaching Staff in Personnel</i> on page 5).
<input type="checkbox"/>	Create the new academic year (please see <i>Creating the New Academic Year</i> on page 18).
<input type="checkbox"/>	Set up the pastoral structure for the new academic year (please see <i>Setting up the New Academic Year's Pastoral Structure</i> on page 21).
<input type="checkbox"/>	Add intake and admission groups (please see <i>Adding Intake/Admission Groups</i> on page 35).
<input type="checkbox"/>	If applicable, import Common Transfer Files.
<input type="checkbox"/>	Record leavers (please see <i>Recording Leavers</i> on page 39).
<input type="checkbox"/>	If applicable, export Common Transfer Files.
<input type="checkbox"/>	Set up the promotion mapping for the new academic year (please see <i>Setting up the Promotion Mapping for the New Academic Year</i> on page 41).
<input type="checkbox"/>	Change the status of applications (please see <i>Changing the Status of Applications to Offered or Accepted</i> on page 49).
<input type="checkbox"/>	Allocate applicants to registration group/classes (please see <i>Allocating Applicants to Registration Groups/Classes</i> on page 52).

Complete	Description/Task
<input type="checkbox"/>	Print class/registration group lists for the new academic year (please see <i>Printing Class (Registration Group) Lists for the New Academic Year</i> on page 55).

Routines for After the New Academic Year has Started

Complete	Description/Task
<input type="checkbox"/>	Admit applicants (please see <i>Admitting Applicants</i> on page 59).
<input type="checkbox"/>	Re-admit pupils (please see <i>Re-Admitting Pupils</i> on page 61).
<input type="checkbox"/>	Add Not Required codes (please see <i>In SIMS Attendance - Using the Part-Time Pupils Routine to Add Not Required Codes</i> on page 62).
<input type="checkbox"/>	Run housekeeping routines (please see <i>Running Housekeeping Routines in SIMS</i> on page 65).

Routines for Fees Billing

Once general year end tasks have been completed, continue with the year end billing tasks.

Complete	Description/Task
<input type="checkbox"/>	Set up new Fiscal Year (via Tools Fees Billing Fiscal Year).
<input type="checkbox"/>	Import or enter new chart of accounts.
<input type="checkbox"/>	Update charge codes to any new accounting structure.
<input type="checkbox"/>	Using global update, remove tuition fees from all leavers (via Focus Fees Billing Charging Global Update).
<input type="checkbox"/>	Using global update, amend all tuition fees to reflect any increase in fees (via Focus Fees Billing Charging Global Update).
<input type="checkbox"/>	Using global update, change charge codes for those moving from one fee to another (via Focus Fees Billing Charging Global Update).
<input type="checkbox"/>	Change the values of charge codes to reflect fee increases (via Tools Fees Billing Charge codes).
<input type="checkbox"/>	Ensure all applicants, who have an accepted place, and are starting in September, have the application status of Accepted via (Focus Admission Applicants).
<input type="checkbox"/>	Ensure all applicants for new term have current bill payer set up (via Focus Admission Applicants).

01 | Introduction

Complete	Description/Task
<input type="checkbox"/>	Deal with deposit payments for all applicants for new term (via Focus Admission Applicants).
<input type="checkbox"/>	Deal with deposit repayments for all leavers.
<input type="checkbox"/>	Enter charges for tuition fees for applicants starting in the new term (via Focus Fees Billing Charging Apply Charges).

For more information, please refer to the *Fees Billing* handbook.

Ensure all the above tasks are completed before processing bills for the Autumn term.

02 | Recording Changes to Teaching Staff in Personnel

Recording Changes to Teaching Staff in Personnel 5

Recording Changes to Teaching Staff in Personnel

This section applies only to schools using Personnel, i.e. you are recording all staff details, including training events and absences in SIMS.

The details of new teachers joining the school should be recorded as soon as the information is available (non-teacher information can be added when known but is not required for the end of year process). Any existing teachers who are leaving the school should be allocated a leaving date.

Adding New Teachers to Personnel

Initially, only **Basic Details** and **Employment Details** need to be entered. Further details can be added as they are known. For full instructions, please refer to the *Managing Staff* handbook.

1. Select **Focus | Person | Staff** to display the **Find Employee** browser. Click the **New** button to display the **Add Employee** page.

2. Enter the **Surname**, **Forename**, then select their **Gender** from the drop-down list.
3. Enter the **Date of Birth** in dd/mm/yyyy format or click the **Calendar** button to select the required date.



Calendar button

4. Click the **Continue** button. SIMS checks to see if the member of staff already exists. If no entry exists, the **Employee Details** page is populated with the data just entered.

02| Recording Changes to Teaching Staff in Personnel

- Click the **Employment Details** tab to display the **Employment Details** panel.

The screenshot shows the 'Employee Details' form for Belinda Bates. The 'Employment Details' tab is active. The form includes the following sections:

- Teaching Staff:** A checked checkbox.
- Teacher Number:** Text input field containing '94/43009'.
- Teacher Category:** Drop-down menu set to 'Qualified Teacher'.
- Staff Code:** Text input field containing 'BEB'.
- Employment Dates:** A table with columns: Employment Start, Leaving Date, Cont Service Start, LA Start, Previous Employer, Next. It contains one record with dates 01/09/2009.
- Check:** A table with columns: Check, Clearance Date, Clearance Level. It contains three records: CRB Check (05/09/2011, CRB Enhanced Clearance), Health Check (27/03/2019, Standard Clearance), and List 99 (26/03/2009, List 99 Cleared).
- Contract:** A table with columns: Status, Start Date, Post, Service Term, Point/Salary. It contains two records: one with a green checkmark (01/09/2016, TEACHER, Teachers Upper, 1.0) and one with a red X (01/09/2009, Teacher, Teachers, 6.0).
- Service Agreement:** A table with columns: Start Date, End Date, Agreement Hours/Week. It is currently empty.

- Select the **Teaching Staff** check box for all teaching staff. This activates the **Teacher Category** drop-down list.

*NOTE: It is important to identify teachers by selecting this check box as it ensures teachers are included in ISC and SLASC returns. It was previously necessary to select the **Teaching Staff** check box for all staff to be timetabled. This is now achieved via **Focus | Person | Manage Classroom Staff** (or, once the record has been saved, by clicking **Classroom Staff Details** in the **Links** panel).*

- Select the required **Teacher Category** (e.g. **Qualified Teacher**) from the drop-down list.
- Enter a **Teacher Number** if required. This must be in the format NN/NNNNN, where N represents a number, e.g. **60/55916**.
- Select the required **Qualified Teacher Status** from the drop-down list.
- Enter a unique **Staff Code** (up to three characters), if required.
- Enter the **Employee/Payroll No.**, if known.
- In the **Employment Dates** panel, create or edit a record and record the continuous service start date (**Cont Service Start**) and **Employment Start** date, or click the respective **Calendar** buttons and select the required dates.

13. Enter the name of the **Previous Employer**, if known.
14. Add a record for a **DBS Check** in the **Check** panel by clicking the **New** button and selecting from the **Check** drop-down list. Enter the date clearance was received (**Clearance Date**) or click the **Calendar** button to select the required date.
15. Add a record for a **Health Check** in the **Check** panel by clicking the **New** button and selecting from the **Check** drop-down list. Enter the date that the questionnaire was returned (**Clearance Date**) or click the **Calendar** button to select the required date.
16. Add records for the additional checks required for your Staff Central Register report, which is required for your inspection reports. These checks are:
 - **ISI Check Level**
 - **Identity Check**
 - **Academic Qualifications**
 - **List 99**
 - **Professional References**
 - **Health Check**
 - **Curriculum Vitae checked**
 - **DBS Check**
 - **Right to Work in the UK**
 - **Character References**
 - **Overseas Check**
 - **Prohibition from Teaching**
 - **Prohibition from Management**
 - **Childcare Disqualification Declaration.**
17. Click the **Save** button to save the record. Repeat this process for any other members of staff joining the school.

Completed

Adding Leaving Dates for Existing Staff Members in Personnel

Enter leaving dates for any teachers as soon as they have left your school.

1. Select **Focus | Person | Staff** to display the **Find Employee** browser.
2. Search for and then select the required member of staff to display their details on the **Employee Details** page.
3. Click the **Employment Details** tab to display the **Employment Details** panel.

02| Recording Changes to Teaching Staff in Personnel

4. In the **Employment Dates** table, highlight the required record and then click the **Open** button to display the **Edit Employment History** dialog.

The screenshot shows a dialog box titled "Edit Employment History for George Davis". It contains a "Details" section with the following fields:

Employment Start Date	17/02/2020	
Date of Leaving	29/07/2022	
Continuous Service Start Date	17/02/2020	
Local Authority Start Date	29/01/2018	
Previous Employer	Brookside Comprehensive	
Next Employer		
Notes	Next employee TBC	

At the bottom of the dialog are "OK" and "Cancel" buttons.

5. Enter the **Date of Leaving** in dd/mm/yyyy format or click the **Calendar** button and select the required date.
6. Click the **OK** button to return to the **Employee Details** page.
7. Click the **Save** button to save the changes. Repeat for any other leavers.

 **Completed**

03 | Creating the New Academic Year

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Creating the New Academic Year

WARNING: Replace the sample dates in this handbook with the dates applicable for your school in the forthcoming academic year.

The Create Academic Year process defines the start and end dates for each of the school terms and half-term holidays, together with dates for public holidays and staff training days. If SIMS Attendance is in use, appropriate attendance records are created for each pupil on the dates entered.

IMPORTANT NOTES:

Due to the amount of processing resource required to create an academic year, whilst not essential, it is strongly recommended that all other users log out of SIMS before commencing this process. Continuing to work whilst an academic year is being created is likely to result in error messages.

Please be aware that the process may take a long time because the system creates attendance records for the new academic year.

When creating an academic year, the start date of the first term is deemed to be the first day of the academic year. This may not necessarily be the day that pupils arrive in school; it could be an INSET day, for example. An end date is calculated for 365 days later.

For example, if the academic year starts on 06/09/2021 then an end date of 05/09/2022 is supplied automatically.

The first day of term should be specified even if pupils are not in attendance.

Any dates within the start and end dates of the academic year that are not term dates or training days, are considered to be holidays. This prevents the need to manually enter holidays (apart from half-terms and bank holidays).

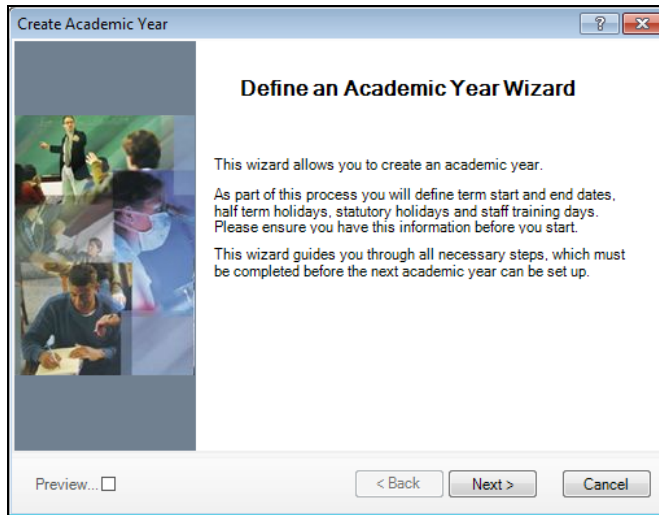
Promotion into new year groups, etc. occurs automatically on the first day of the first term of the new academic year (providing that the promotion process has been carried out).

Before proceeding, please check that you have carried out the following:

- Recorded any changes to teaching staff (adding any new teachers and dates of leaving for any leavers).
- Ensured that you have the new academic year term dates, training days, etc. to hand.

03 | Creating the New Academic Year

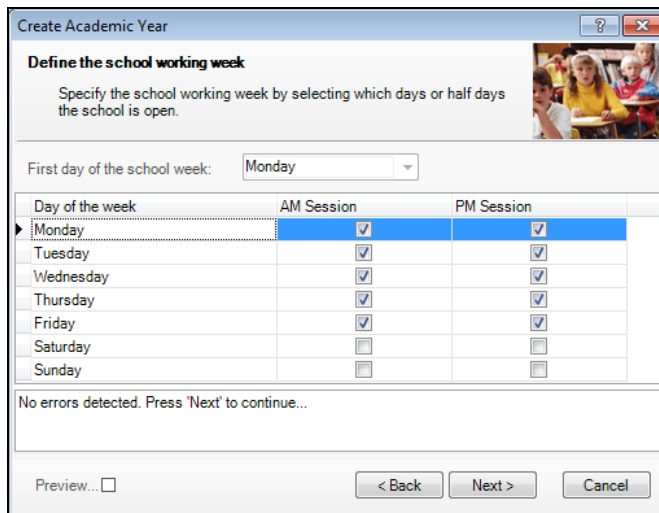
1. Select **Routines | School | Academic Year** to display the **Create Academic Year** wizard.



2. Click the **Next** button to display the **Define the school working week** page.

Defining the School Working Week

The **First day of the school week** drop-down list is read-only and displays the first day of your school week, as specified when your system was first set up.



1. Define the days when the school will be open by selecting the check box(es) adjacent to each required day, including both AM and PM sessions, as required. **AM Session** and **PM Session** check boxes are selected by default for Monday through to Friday.

NOTE: Boarding schools should select all fourteen sessions to record weekend registration.

- Click the **Next** button to display the **Define the terms and term holidays for the academic year** page.

Defining School Terms

When entering term dates, the start date should always be the date the term starts, even if pupils are not in school on those days.

Create Academic Year

Define the terms and term holidays for the academic year

Define the school terms start and end dates.

School Terms and Holidays

School Term	Term Start Date	Term End Date	Term Holiday
Autumn Term	06/09/2021	17/12/2021	Christmas Holiday
Spring Term	04/01/2022	01/04/2022	Easter Holiday
Summer Term	19/04/2022	22/07/2022	Summer Holiday

No errors detected. Press 'Next' to continue...

Add Term... Remove

Preview...

< Back Next > Cancel

- Enter the dates for the Autumn, Spring and Summer terms by clicking in the applicable **Term Start Date** and **Term End Date** fields and then entering the required dates in dd/mm/yyyy format. Alternatively, click in the date cell to display a down arrow, then click the arrow to display a calendar, from which the required date can be selected.

Create Academic Year

Define the terms and term holidays for the academic year

Define the school terms start and end dates.

School Terms and Holidays

School Term	Term Start Date	Term End Date	Term Holiday
Autumn Term	06/09/2021	17/12/2021	Christmas Holiday
Spring Term	04/01/2022		
Summer Term	19/04/2022		

No errors detected. Press 'Next' to continue...

Add Term... Remove

Preview...

< Back Next > Cancel

NOTES: If a different **School Term** name is required, overwrite the default name with a description appropriate to your school. Schools that have more than three terms in their academic year need to add additional terms (please see Adding Additional School Terms on page 13).

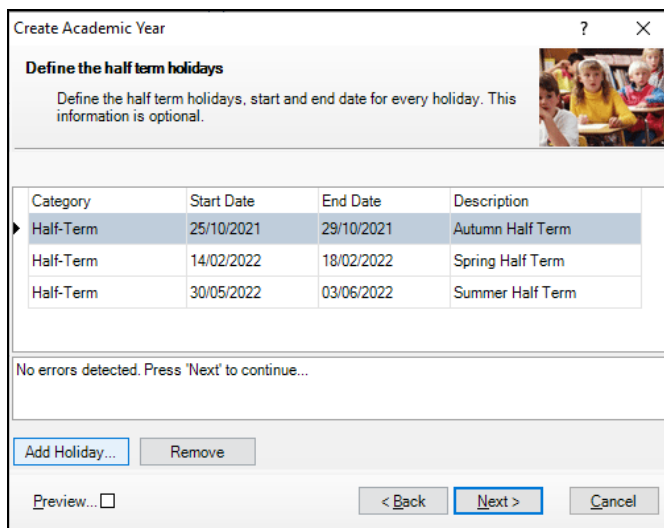
03| Creating the New Academic Year

2. Each term has a default **Term Holiday**. If required, select a different holiday from the drop-down list or manually enter a new holiday name.
3. Repeat this process for all the terms displayed, specifying the applicable holiday for each term.

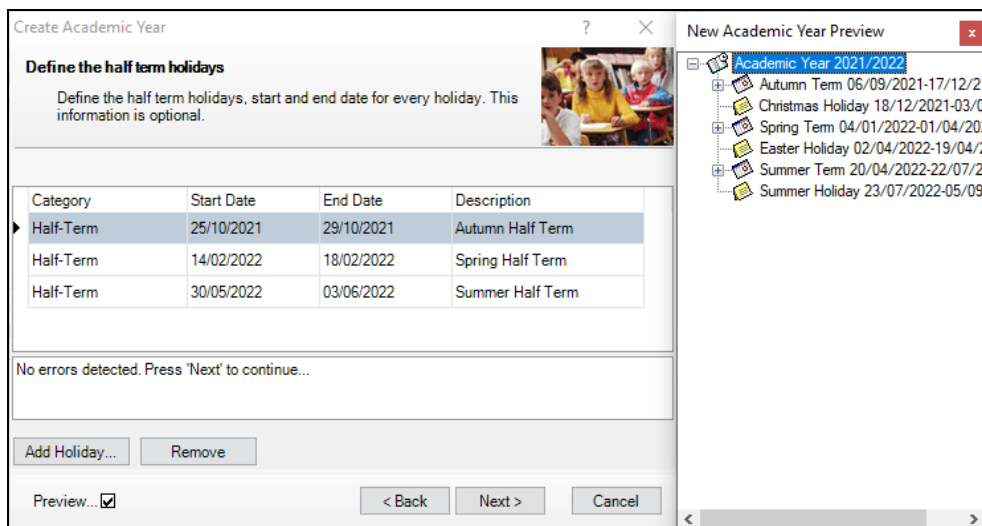
Any errors are displayed in the lower section of the wizard and must be resolved before you can proceed.

4. When the school terms, term start and end dates, and term holidays have been defined, click the **Next** button to display the **Define the half term holidays** page and proceed to *Defining Half Term Holidays*.

NOTE: If the **Next** button is greyed out, move the cursor off the last **Term End Date** by pressing the **Tab** key.



From this point onwards, you can select the **Preview** check box in the wizard to display a preview panel on the right-hand side of the wizard. The preview panel updates based on the selections you make throughout the process. Deselect the **Preview** check box whenever you want to hide the preview panel.

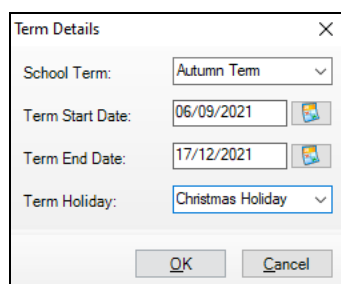


Adding Additional School Terms

Some schools may want to add additional terms, if for example your school has four or six terms in an academic year. The following example demonstrates the addition of an Autumn term.

NOTE: When adding terms, the start date should always be the date the term starts, even if pupils are not in school on that day.

1. From the **Define the terms and term holidays for the academic year** page of the wizard, click the **Add Term** button to display the **Term Details** dialog.



The screenshot shows a 'Term Details' dialog box with the following fields and values:

- School Term: Autumn Term
- Term Start Date: 06/09/2021
- Term End Date: 17/12/2021
- Term Holiday: Christmas Holiday

Buttons for 'OK' and 'Cancel' are visible at the bottom.

2. Select the term name from the **School Term** drop-down list. If the required name does not exist, enter a name manually, e.g. *Autumn Term*.
3. Enter the **Term Start Date** and **Term End Date** in dd/mm/yyyy format. Alternatively, click the **Calendar** buttons and select the required dates from the calendars.



Calendar button

4. Select the holiday that will follow the term from the **Term Holiday** drop-down list, e.g. **Christmas Holiday**. If the required name does not exist, enter the holiday name manually, e.g. **Christmas Holiday**.
5. Click the **OK** button to add the term.
6. Repeat for any other additional terms that may be required.
7. Click the **Next** button to display the **Define the half term holidays** page.

Defining Half Term Holidays

Term holidays are created automatically for the dates in between the term dates entered. For example, if the Spring term ends on 01/04/2022 and the Summer term starts on the 19/04/2022, then it is assumed that the dates in between are holidays, e.g. Easter Holiday. However, the dates for half-term holidays need to be entered manually.

03| Creating the New Academic Year

NOTE: You do not need to define half-term holidays if you have created a six term academic year, where the half-term dates fall between the terms.

The screenshot shows a window titled "Create Academic Year" with a sub-section "Define the half term holidays". Below the title is a small image of children. The main area contains a table with columns: Category, Start Date, End Date, and Description. Below the table, it says "No errors detected. Press 'Next' to continue...". At the bottom, there are buttons for "Add Holiday...", "Remove", "Preview..." (with a checkbox), "< Back", "Next >", and "Cancel".

1. From the **Define the half term holidays** page, click the **Add Holiday** button to display the **Half Term Holiday Details** dialog.
2. Select **Half-Term** from the **Category** drop-down list.
3. Enter the **Start Date** and **End Date** for the half-term holiday in dd/mm/yyyy format. Alternatively, click the **Calendar** buttons and select the required dates from the calendars.
4. Enter a **Description** for the half-term holiday if required, such as **Autumn Half-Term**. This description appears in the School Diary.

The screenshot shows a dialog box titled "Half Term Holiday Details". It has a "Category" dropdown menu set to "Half-Term". Below it are "Start Date" and "End Date" fields, both containing "25/10/2021" and "29/10/2021" respectively, with calendar icons to their right. The "Description" field contains "Autumn Half Term". At the bottom are "OK" and "Cancel" buttons.

5. Click the **OK** button to add the half-term holiday.

6. Repeat steps 1 to 5 for both the Spring and Summer half-term holidays.

Create Academic Year

Define the half term holidays

Define the half term holidays, start and end date for every holiday. This information is optional.

Category	Start Date	End Date	Description
Half-Term	25/10/2021	29/10/2021	Autumn Half Term
Half-Term	14/02/2022	28/02/2022	Spring Half Term
Half-Term	30/05/2022	03/06/2022	Summer Half Term

No errors detected. Press 'Next' to continue...

Add Holiday... Remove

Preview...

< Back Next > Cancel

7. Click the **Next** button to display the **Define teacher training days** page.

Defining Teacher Training Days

The **Define teacher training days** page is used to enter any training days where pupils will not be attending school. It is advisable to enter any known INSET days at this point. Alternatively, they can be added later via the School Diary (**Focus | School | School Diary**).

Create Academic Year

Define teacher training days

This information is optional at this stage and can be defined later via the School Diary.

Category	Date	Description
----------	------	-------------

No errors detected. Press 'Next' to continue...

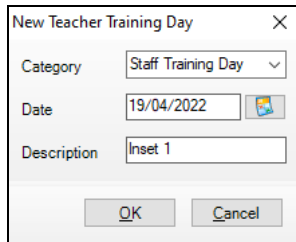
Add Remove

Preview...

< Back Next > Cancel

03| Creating the New Academic Year

1. From the **Define teacher training days** page, click the **Add** button to display the **New Teacher Training Day** dialog.



New Teacher Training Day

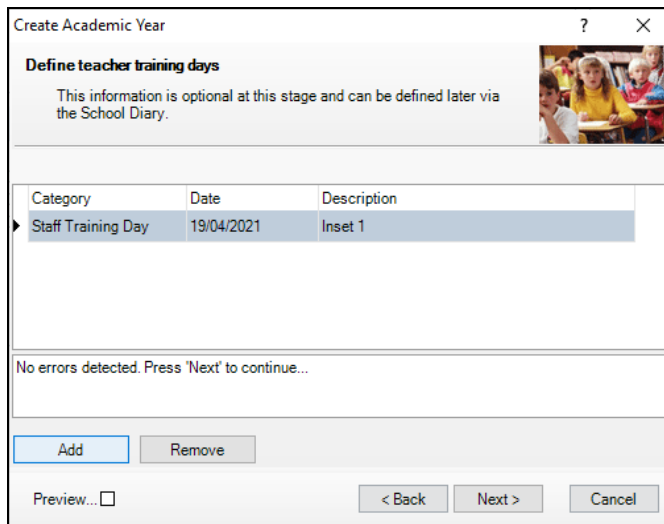
Category: Staff Training Day

Date: 19/04/2022

Description: Inset 1

OK Cancel

2. Select **Staff Training Day** from the **Category** drop-down list. If the required category name does not exist, enter the name manually.
3. Enter the **Date** of the training day in dd/mm/yyyy format or click the **Calendar** button and select the date.
4. Enter a relevant **Description** if required, e.g. INSET 1, to ensure that the type of training can be identified. The description appears in the School Diary.
5. Click the **OK** button to add the teacher training day. Repeat for any other required teacher training days.



Create Academic Year

Define teacher training days

This information is optional at this stage and can be defined later via the School Diary.

Category	Date	Description
Staff Training Day	19/04/2021	Inset 1

No errors detected. Press 'Next' to continue...

Add Remove

Preview...

< Back Next > Cancel

6. Click the **Next** button to display the **Define public holidays** page.

Defining Public Holidays

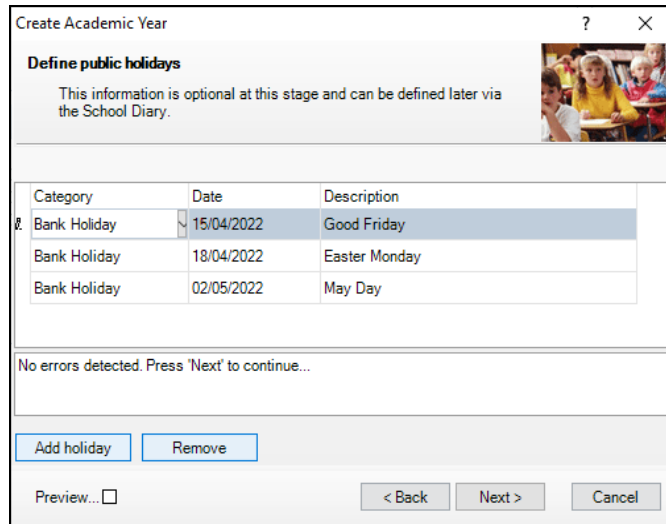
In addition to other dates during term time, you will also need to specify any public holidays, such as Bank Holidays, that occur during term time.

1. From the **Define public holidays** page, click the **Add holiday** button to display the **New Public Holiday** dialog.

2. Select **Bank Holiday** from the **Category** drop-down list. If the category name does not exist, enter the name manually.
3. Enter the **Date** of the public holiday in dd/mm/yyyy format or click the **Calendar** button and select the required date.
4. Enter a relevant **Description**, such as `Good Friday`. This description appears in the School Diary.

03| Creating the New Academic Year

5. Click the **OK** button to add the public holiday. Repeat this process for all public holidays throughout the academic year.



The screenshot shows a dialog box titled "Create Academic Year" with a sub-header "Define public holidays". Below the sub-header is a message: "This information is optional at this stage and can be defined later via the School Diary." To the right of the message is a small image of children in a classroom. Below the message is a table with three columns: "Category", "Date", and "Description". The table contains three rows of data:

Category	Date	Description
Bank Holiday	15/04/2022	Good Friday
Bank Holiday	18/04/2022	Easter Monday
Bank Holiday	02/05/2022	May Day

Below the table is a message: "No errors detected. Press 'Next' to continue...". At the bottom of the dialog box are several buttons: "Add holiday", "Remove", "Preview..." (with a checkbox), "< Back", "Next >", and "Cancel".

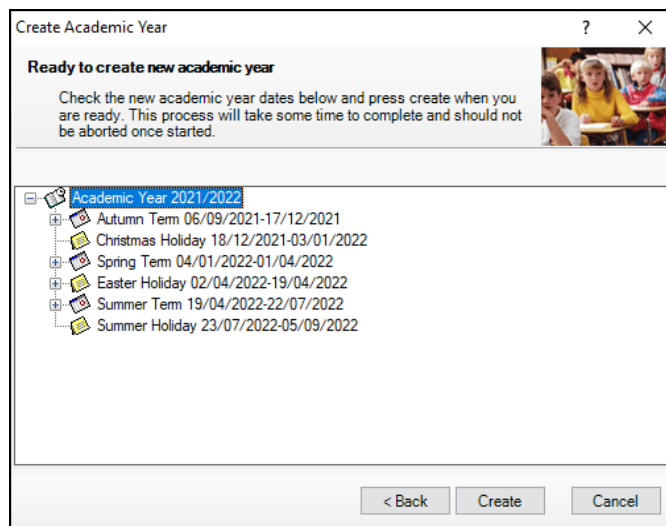
6. Click the **Next** button to display the **Ready to create new academic year** page.

Creating the New Academic Year

WARNING: Replace the sample dates in this handbook with the dates applicable for your school in the forthcoming academic year.

Whilst it is not essential, it is strongly recommended that all other users log out of SIMS before commencing this process. This is because a large amount of processing resource is required to create an academic year.

Please be aware that this process may take a long time because the system creates attendance records for the new year.



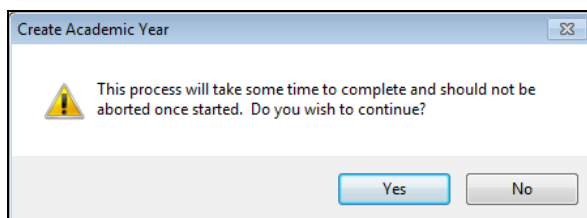
The screenshot shows a dialog box titled "Create Academic Year" with a sub-header "Ready to create new academic year". Below the sub-header is a message: "Check the new academic year dates below and press create when you are ready. This process will take some time to complete and should not be aborted once started." To the right of the message is a small image of children in a classroom. Below the message is a tree view showing the structure of the academic year:

- Academic Year 2021/2022
 - Autumn Term 06/09/2021-17/12/2021
 - Christmas Holiday 18/12/2021-03/01/2022
 - Spring Term 04/01/2022-01/04/2022
 - Easter Holiday 02/04/2022-19/04/2022
 - Summer Term 19/04/2022-22/07/2022
 - Summer Holiday 23/07/2022-05/09/2022

At the bottom of the dialog box are three buttons: "< Back", "Create", and "Cancel".

1. A summary of the data entered is displayed on the **Ready to create new academic year** page. The detail for each term can be expanded to display its public holidays, teacher training days, etc. by clicking the applicable **+** icon. You are strongly advised to check this information carefully for any errors or inaccuracies.

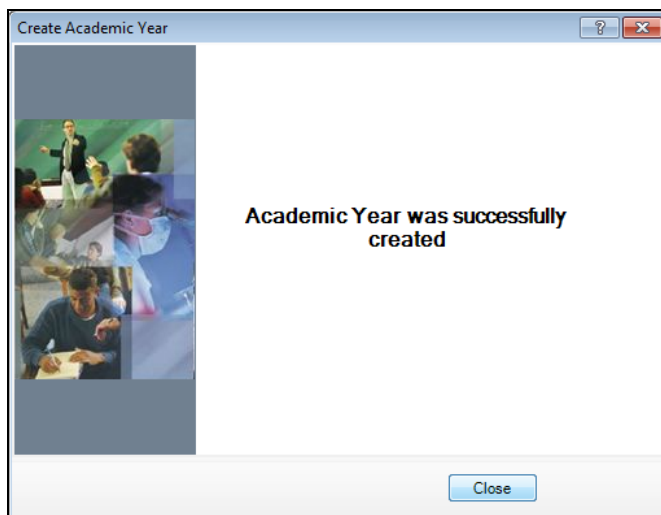
Once you are sure that the information is correct, click the **Create** button to create the new academic year. If there are any anomalies in your settings, you are asked to confirm whether you want to proceed or review your settings. If you are certain the data is correct, you can proceed. The following warning message is displayed:



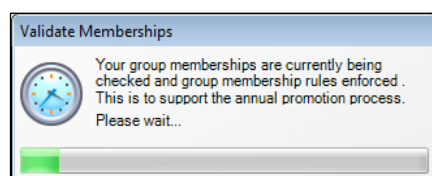
Progress is displayed via a progress indicator at the bottom of the wizard.



Once complete, the final page of the wizard is displayed.



2. Click the **Close** button to close the wizard and complete the process.
3. It is recommended that once you have created an academic year, you validate group memberships by selecting **Tools | Validate Memberships**, which displays the following page.



Completed

03 | *Creating the New Academic Year*

04 | Setting up the New Academic Year's Pastoral Structure

Setting up the New Academic Year's Pastoral Structure 21

Setting up the New Academic Year's Pastoral Structure

The new academic year's pastoral structure is set up automatically when the new academic year is created and is based on the current academic year's structure. Therefore, you must ensure that a new academic year has been created before proceeding with the instructions in this section.

There may be occasions when the pastoral structure of the new academic year needs to be different from the current structure. For example, you may want to:

- add additional registration group/classes, where pupil numbers have increased.
- merge registration group/classes, where pupil numbers have decreased.
- add a new year group, e.g. where a Nursery has been introduced in your school.
- change class names.

NOTES: It is not essential to assign teachers to registration group/classes at this stage. This can be done when the information is known but must be done before the start of the academic year so that Attendance records are not affected.

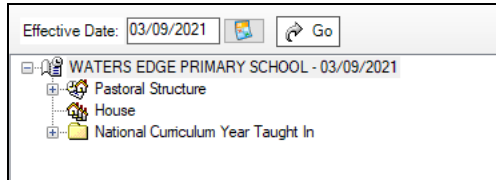
If you want teachers to be promoted with their pupils in the next academic year, this can be achieved as part of the pastoral promotion process (please see Setting up the Promotion Mapping for the New Academic Year on page 41).

If an additional year group is required, e.g. a Nursery has been introduced to the school, this should be added before admission groups are created to ensure that the new year group is available for selection (please see Adding Intake/Admission Groups on page 35). It is essential that the short name of each year group matches exactly the name of the corresponding year in Nova-T, so that the transfer of the curriculum plan and timetable to SQL operates correctly.

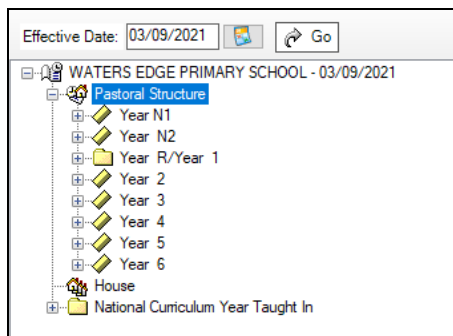
Opening the Structure of the New Academic Year

1. Select **Focus | School | Pastoral Structure | Next Academic Year Structure** to display the **Next Academic Year Pastoral Structure** page.

IMPORTANT NOTE: To ensure that changes are being made for the next academic year rather than the current academic year, ensure that the start date of the next academic year is displayed in the **Effective Date** field.



2. The **Effective Date** defaults to the start date of the next academic year. Whilst it is possible to change this date to view information, the default date must be used to edit information.



IMPORTANT NOTE: If you change the **Effective Date**, you must click the **Go** button to refresh the display.

3. The full structure can be viewed by clicking the **+** or **-** icons to expand or contract the display.

Checking National Curriculum Years

Please ensure that the National Curriculum year associated with each year group is correct. This can be achieved by right-clicking each year group and selecting **Properties** from the pop-up menu to display the **Year Group** dialog. The **National Curriculum Year** associated with the year group is displayed.

Completed

Adding New Year Groups

If an additional year group is required, e.g. a Nursery has been introduced to the school, this should be added before admission groups are created to ensure that the new year group is available for selection.

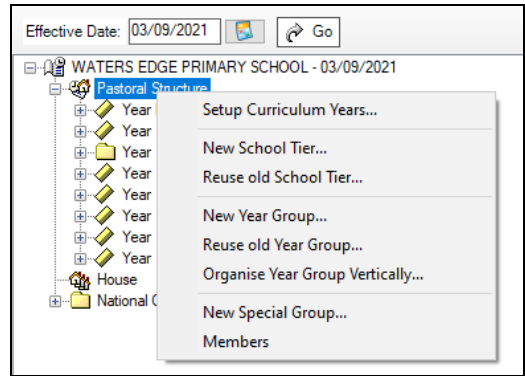
NOTE: Schools that have a Nursery and admit pupils into the Nursery later on in the academic year, e.g. in January, may benefit from creating either an N1 or N2 year at this point. This enables pupils to be assigned to the appropriate National Curriculum year when they join the school. This ensures the accuracy of a School Census return.

This process is unlikely to be required. If you do not intend to add any new year groups, please proceed to *Adding Classes (Registration Groups)*.

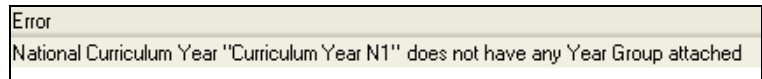
1. Select next year's pastoral structure (please see *Opening the Structure of the New Academic Year* on page 22).

04| Setting up the New Academic Year's Pastoral Structure

*NOTE: If you are adding a year group because you are extending the range of years, you will also need to set up a National Curriculum year. This is achieved by right-clicking the **Pastoral Structure** item in the navigation tree, selecting **Setup Curriculum Years** and then selecting the required curriculum year check box.*

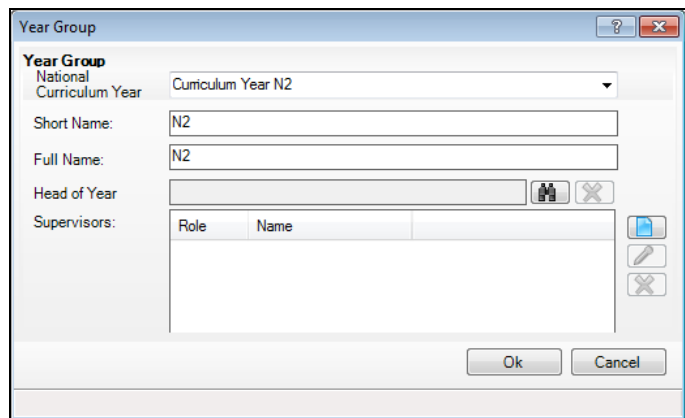


Errors are displayed at the bottom of the screen until years and classes have been added (as shown in the following graphic).



NOTE: Once a National Curriculum year has been created, it cannot be deleted. Therefore, please ensure that the correct NC year is added.

2. Right-click the **Pastoral Structure** item in the structure and select **New Year Group** from the pop-up menu to display the **Year Group** dialog.



3. Select the **National Curriculum Year** with which the year group will be associated, from the drop-down list.

- Enter a **Short Name** and a **Full Name** for the year group.
The **Full Name** (up to 32 characters) is used throughout SIMS to identify the year group (e.g. **Year 2**). The **Short Name** (up to 10 characters) is used for column headings in reports (e.g. **Y2**). Consequently, to ensure column headings fit comfortably on the report page, it is recommended that short names should be as short as possible, e.g. a maximum of six characters. Both names must be unique within the school.
- Select the **Head of Year** if required, by clicking the **Browser** button to display the **Select person** dialog. This is optional (as many Primary schools do not have Heads of Year) and/or can be done at a later date if preferred. If you do not intend to add a Head of Year, please proceed to step 8.



Browser button

- Enter a **Surname** and/or **Forename** and then click the **Search** button. Alternatively, leave the fields blank to search for all staff.

Highlight the required person and click the **OK** button to select them as the Head of Year and return to the **Year Group** dialog.

- Select a **Supervisor** for the year group (if required) by clicking the **New** button to display the **Supervisor Properties** dialog. This is optional and/or can be done at a later date if preferred. If you do not intend to add a Supervisor, please proceed to step 8.



New button

04| Setting up the New Academic Year's Pastoral Structure

- Select the **Role** from the drop-down list and then click the **Browser** button adjacent to display the **Select person** dialog.

NOTE: By default, the **Role** drop-down list displays **Supervisor** and **Pastoral Manager**.

- Search for, and select, the required supervisor in the same way as the Head of Year. Click the **Ok** button on the **Supervisor Properties** dialog to set the selected person as the supervisor and return to the **Year Group** dialog.
8. Click the **Ok** button on the **Year Group** dialog to add the year group. You must now add applicable classes, as described in the next section.

Completed

Adding Classes (Registration Groups)

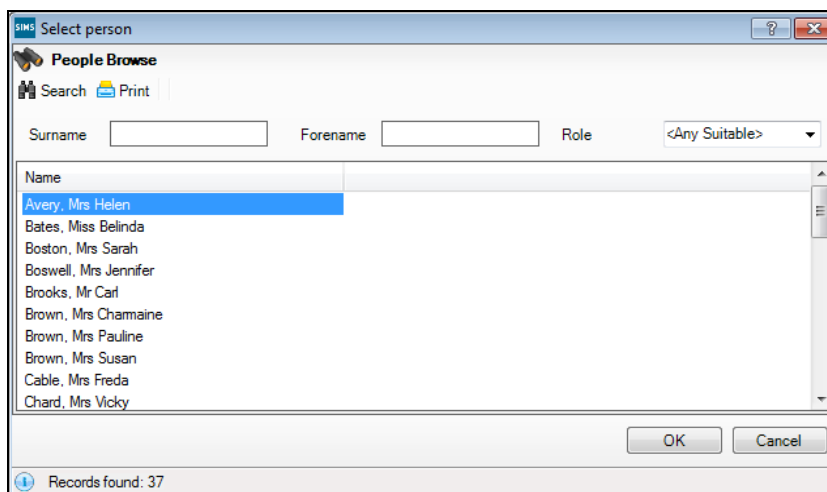
You are strongly advised to check whether the name you intend to use for a new class has not previously been used. This is achieved by expanding the Pastoral Structure and appropriate year group, then right-clicking the **Registration Group** folder and selecting **Reuse Old Registration Groups** from the pop-up menu to display the **Reuse old Registration Group** dialog. This dialog lists any classes that have previously been deleted.

If the required name is listed, highlight it and click the **OK** button to re-use the class rather than create a new class with the same name. If the required name is not listed, click the **Cancel** button, then create a new class as follows.

1. Select next year's pastoral structure (please see *Opening the Structure of the New Academic Year* on page 22).
2. Expand the year group to which you wish to add the class by clicking the adjacent **+** icon.
3. Right-click the **Registration Group** folder and select **New Registration Group** from the pop-up menu to display the **Class** dialog.

Role	Name
------	------

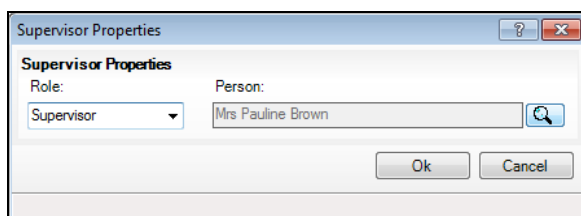
4. Enter a **Short Name** and **Full Name** for the new class.
The **Full Name** (up to 32 characters) is used throughout SIMS to identify the class, e.g. Rowan. The **Short Name** (up to 10 characters) is used for column headings in reports. Consequently, to ensure column headings fit comfortably on the report page, it is recommended that short names should be as short as possible, e.g. a maximum of six characters. Both names must be unique within the school.
5. Add the **Registration Tutor** by clicking the **Browser** button to display the **Select person** dialog.



6. Enter a **Surname** and/or **Forename** and then click on the **Search** button. Alternatively, leave the fields blank to search for all staff.
7. Highlight the required person and click the **OK** button to select them as the Registration Tutor and return to the **Class** dialog.
8. Select a **Supervisor** for the class (if required) by clicking the **New** button to display the **Supervisor Properties** dialog. This is optional and can be done at a later date if preferred. If you do not intend to add a Supervisor, please proceed to step 9.



New button

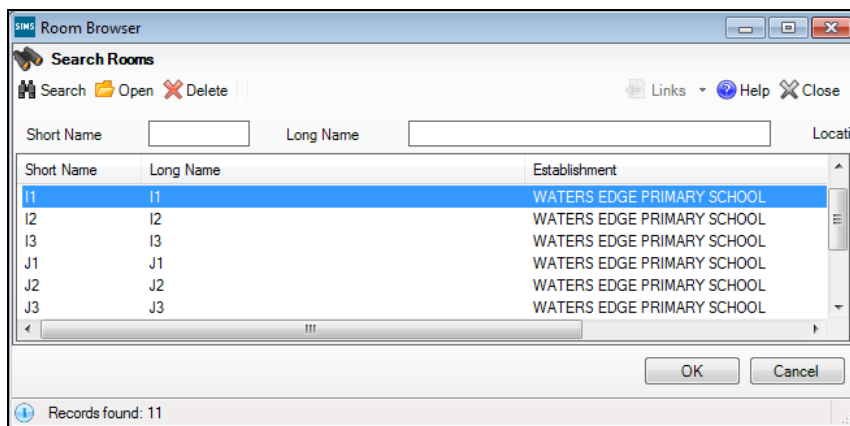


04| Setting up the New Academic Year's Pastoral Structure

- Select the **Role** from the drop-down list and then click the **Browser** button adjacent to the **Person** field to open the **Select Person** browser. Select the required person in the same way as for the Registration Tutor.

NOTE: By default, the **Role** drop-down list displays **Supervisor**, **Pastoral Manager** or **Joint Main Supervisor**.

- Click the **Ok** button on the **Supervisor Properties** dialog to select the person as the Supervisor for the class return to the **Class** dialog.
9. Select the **Room** that will be used by this class (if required) by clicking the **Browser** button to display the **Room Browser** dialog.



- Enter either the **Short Name** or the **Long Name** of the room and then click the **Search** button. Alternatively, leave all of the fields blank to search for all rooms.
 - Highlight the required room and then click the **OK** button to return to the **Class** dialog.
10. Click the **OK** button to create the class.



Additional Resources:

Adding Rooms tutorial in the SIMS **Documentation Centre**
Adding/Editing Rooms chapter in the *Setting Up and Administering SIMS* handbook

Completed

Important Note on Editing Class Names

There may be occasions when you wish to rename classes in either the current or next year's pastoral structure. This is sometimes required by schools that name their classes based on teacher's initials and the teacher then leaves the school.

It is essential that you do not just rename the class. This is because the class name is recorded in the class history. If you change the name, the change is made throughout the history of that class, so the class is recorded as always having been named according to the name change.

*NOTE: To ensure that you do not rename a class to a name that already exists, right-click the required **Registration Group** folder in the pastoral structure and select **Reuse Old Registration Groups**. Any classes that have previously been deleted are displayed. If the required name is listed, highlight it and then click the **OK** button to re-use it rather than create a new class with the same name. If the required name is not listed, create a new class.*

Please see the following two examples:

Example 1:

A class is currently called **4AB** after a teacher named Anita Brown. At the end of the current academic year, Anita will move up with her class, which becomes **5AB**.

If you rename **4AB** to **5AB** then all the pupils in **4AB** will be recorded as always having been in **5AB** because the history is also amended.

In this circumstance, all you need to do is to create a new class called **5AB** in the pastoral structure for the new academic year (e.g. 2021/2022) and set the promotion mapping to promote to this class at the start of the new academic year. All pupils in **4AB** will move up to **5AB** at the start of the new academic year (please see *Setting up the Promotion Mapping for the New Academic Year* on page 41).

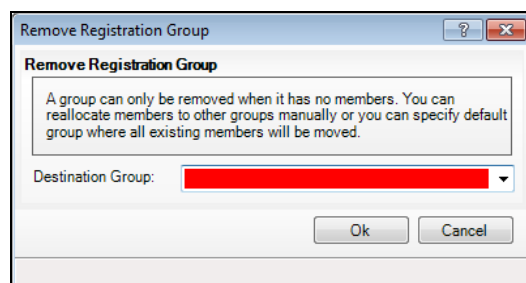
Example 2:

A class is currently called **4SL** after a teacher named Sonia Lovell. Sonia is leaving and will be replaced by Andrew White during the same academic year.

If you rename **4SL** to **4AW** then all the pupils in **4SL** will be recorded as always having been in **4AW** because the history is also amended.

To correctly change a class name:

1. Add a new class (please see *Adding Classes (Registration Groups)* on page 26) in the current pastoral structure (e.g. 2020/2021) labelled with the new class name (e.g. **4AW**).
2. Delete the old class by right-clicking the required class name and selecting **Remove** from the pop-up menu to display the **Remove Registration Group** dialog.



3. Select the newly created class (e.g. **4AW**) from the **Destination Group** drop-down list. All members from the old class will be transferred to the new class.
4. Click the **Ok** button to delete the class and transfer the pupil memberships.
5. Click the **Save** button to save the changes.

General Advice

The responsibility for defining the naming convention of classes lies with the school. However, you should note that if you use teacher initials, you must carry out the previous instructions each time a teacher leaves or if there are any teaching changes that result in a class name change, e.g. teachers change class or years mid-year. In addition, you will need to create new classes based on the teacher initials for each new academic year as described in Example 1. If you wish to use teacher initials, it is far easier if you do not precede the class name with the year, e.g. use **SL** rather than **4SL**.

Primary schools may wish to use classes named after trees, colours, animals, etc. An alternative is to name classes by year and a single initial (not based on a teacher's name) such as **3A**, **3B**, etc. that remain static year on year.

Changing Year Group Horizontal/Vertical Structures

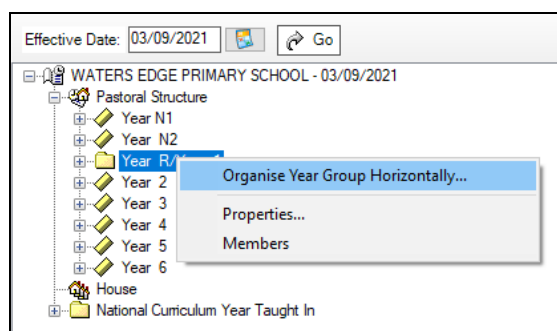
There may be occasions where you want the pastoral structure for the new academic year to be different to that of the current year. For example:

- As a consequence of falling pupil numbers. This may require you to change from a horizontal to a vertical structure to enable pupils from mixed year groups to be taught in the same class.
- As a consequence of increasing pupil numbers. This may require you to change from a vertical to a horizontal structure to enable pupils from the same year to be taught in the same class.
- As a consequence of a change in pupil numbers across the years, e.g. a low birth rate one year, then a high birth rate two years later. This may require you to change to a combined horizontal and vertical structure.

Changing from a Vertical to a Horizontal Structure

This process may be required if, for example, your pupil numbers have increased. This would enable previously merged years, such as Nursery/Reception (vertically structured) to be split into two separate years (horizontally structured) because there are now sufficient pupils from the same year group to be taught in one class.

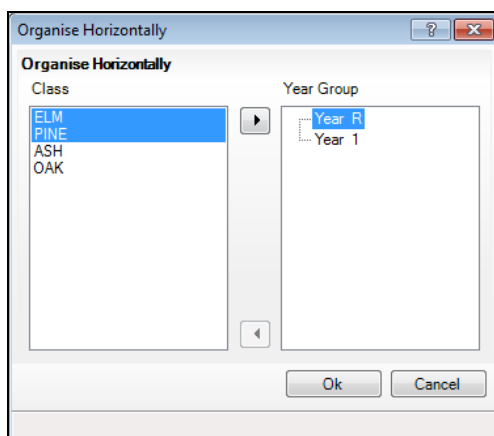
1. Select next year's pastoral structure (please see *Opening the Structure of the New Academic Year* on page 22).
2. Expand the **Pastoral Structure** heading by clicking the **+** icon. Vertically organised year groups can be identified by their names, separated by a forward slash, e.g. **Nursery/Reception**.



- Right-click the vertically organised year group and select **Organise Year Group Horizontally** from the pop-up menu to display the **Organise Horizontally** dialog.

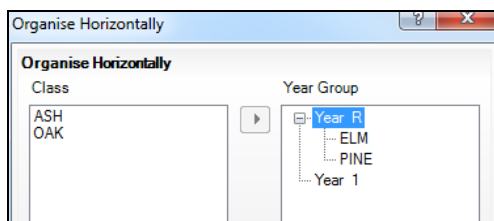
This dialog enables you to determine the class(es) that should be attached to each year.

- In the **Class** panel, highlight the class(es) you wish to attach to a year (hold down the **Ctrl** key and click the class names to highlight more than one class), then click the required year group in the **Year Group** panel.

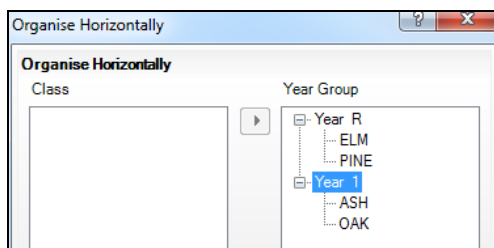


In the previous example, **ELM** and **PINE** are being attached to the Reception (**Year R**).

- Click the right arrow button in the centre of the dialog to attach the selected class(es) to Reception (**Year R**). The class(es) are moved under the **Year R** heading, as shown in the following example.



- Repeat steps 4 and 5 for all the remaining classes in the **Class** panel.

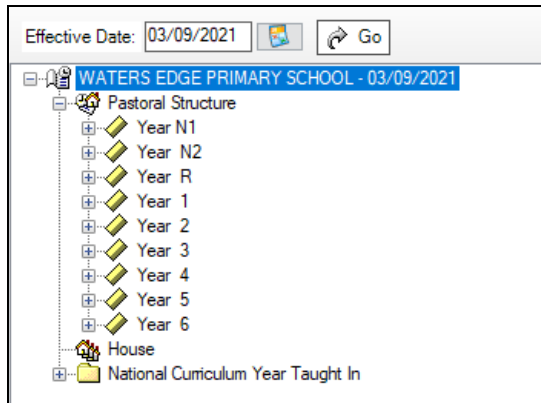


NOTE: Each class must be attached to a single year group and therefore, the **Class** panel must be empty before you can complete the process.

- Click the **Ok** button to save the details.

04| Setting up the New Academic Year's Pastoral Structure

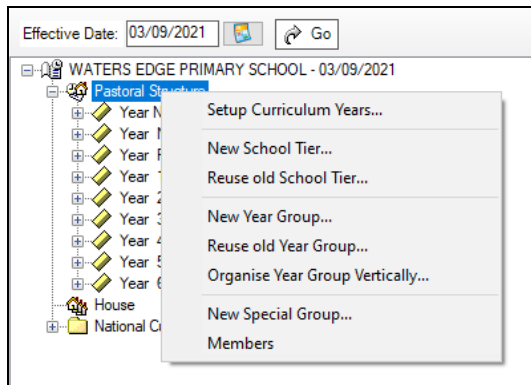
The pastoral structure should now show the two previously merged years as separate years, as shown in the following example.



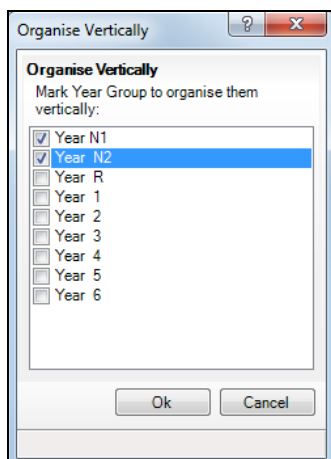
Changing from a Horizontal to a Vertical Structure

This process may be required if, for example, your pupil numbers have decreased. This could allow previously separate years, such as Nursery and Reception (horizontally structured) to be merged into a single year (vertically structured) because there are insufficient pupils from the same year group to be taught in one class.

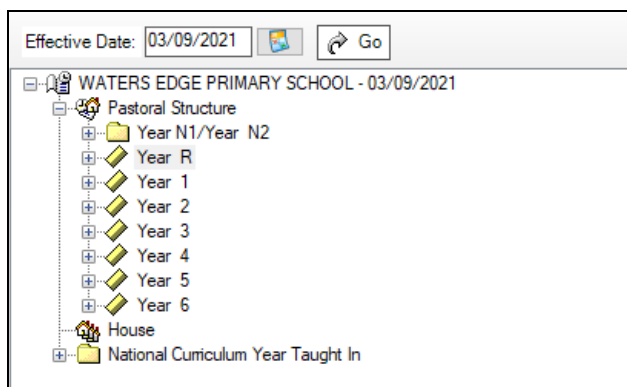
1. Select next year's pastoral structure (please see *Opening the Structure of the New Academic Year* on page 22).



- Right-click **Pastoral Structure** and select **Organise Year Group Vertically** from the pop-up menu to display the **Organise Vertically** dialog.



- Select the check boxes adjacent to the **Year N2** and **Year R** (Nursery and Reception years) you wish to merge into a vertical structure. In the previous example, Nursery and Reception are being merged into a vertical structure.
- Click the **Ok** button to merge the selected years, which are then displayed in the pastoral structure separated with a /, as shown in the following example.



Saving the Amended Pastoral Structure

Once the required changes have been made to the pastoral structure, click the **Save** button to save the structure. This may take some time depending on the number of changes that have been made.

Completed

04 | *Setting up the New Academic Year's Pastoral Structure*

05 | Adding Intake and Admission Groups

Adding Intake/Admission Groups 35

Adding Intake/Admission Groups

Intake and admission groups are used to maintain lists of the applicants who have registered an interest in being taught at your school. It is now possible to create an intake group containing one or more admission groups. For example, an intake group consisting of separate admission groups for those joining in Autumn, Spring and Summer terms might be set up for your Nursery.

IMPORTANT NOTE: Please ensure that the **Date of Admission** lies within the new academic year. We recommend that the date of admission is the day on which the applicants will actually arrive in school, i.e. not a teacher training day.

If you have previously created admission groups with an incorrect **Date of Admission**, amending the date also amends the **Date of Admission** for every applicant who is a member of the group, preventing the need to edit them individually.

If you need to add a new year group but have already created intake/admission groups, you will need to create new intake/admission groups after the additional year group has been added and then move any existing members to the new intake/admission group(s).

This is also a good time to delete or make inactive any unwanted admission groups. Detailed instructions on adding and maintaining admission groups can be found in the appropriate *Admissions* handbook.

1. Select **Routines | Admission | Admission Groups | Setup** to display the **Find Intake Group** browser.

Name	Admission Year	Admission Season	Year Group	Planned Admission	Status
2021/2022 - Autumn Year N2	2021/2022	Autumn	Year N2	20	Active
2021/2022 Autumn Year R	2021/2022	Autumn	Year R	40	Active
2021/2022 Autumn Year N1	2021/2022	Autumn	Year N1	8	Active

2. Carry out a search to ensure that the intake group does not already exist.

05| Adding Intake and Admission Groups

3. Click the **New** button to display the **Intake Group Details** page. Mandatory fields are highlighted in red. The page will look slightly different depending on whether you have set up SIMS to allow multiple admission groups to be added.

The screenshot shows the 'Intake Group Details' form. It is divided into two sections: '1 Intake Group' and '2 Admission Group'. In the '1 Intake Group' section, the 'Admission Year' dropdown is set to '2021/2022'. The 'Admission Season', 'Year Group', and 'Planned Admission' fields are highlighted in red. The 'Name' field is also highlighted in red. In the '2 Admission Group' section, the 'Name' and 'Date Of Admission' fields are highlighted in red. The 'Active' checkbox is checked.

4. In the **Intake Group** panel, select the **Admission Year** to which the intake group relates (e.g. 2021/2022) from the drop-down list (this defaults to the current academic year).
5. Select the required **Admission Season (Autumn, Spring or Summer)** or, if the intake group does not apply to a specific season, select **Integrated** from the drop-down list.

The screenshot shows the 'Intake Group Details' form with the following fields populated: 'Admission Year' is '2021/2022', 'Admission Season' is 'Autumn', 'Year Group' is 'Year 2', and 'Planned Admission' is '20'. The 'Name' field is populated with '2021/2022 - Autumn Year 2'. The 'Active' checkbox is checked.

6. Select the required **Year Group** from the drop-down list.
7. Enter the number of applicants that you expect to admit to this intake group in the **Planned Admission** field.
8. Select a previously defined admissions policy from the **Admission Policy** drop-down list, if required.
9. Enter the number of applications that should be ranked in the **Numbers to Rank** field. By default, all applications in an intake are ranked.
10. If you press the **Tab** key to move to the **Name** field or click in this field, a default name is supplied for the intake group, based on the **Admission Year, Admission Season and Year Group**, e.g. **2021/2022 – Autumn Year N2**. The default name can be amended, if required.
11. The **Active** check box is selected by default and indicates that the intake group is available for use. Deselect this check box only if you wish to create intake groups that will be used at some point in the future (they will not be displayed in the **Find Intake Group** browser by default).

Adding One or More Admission Groups

This section is applicable if SIMS is set up to allow the use of multiple admission groups and describes how to add one or more admission groups to an intake group. If you are not sure, please refer to the graphics in the previous section. If the second panel is labelled **Admission Groups**, SIMS is set up to allow multiple admission groups. If the second panel is labelled **Admission Group**, SIMS is not set up to allow multiple admission groups. If SIMS is not set up to use multiple admission groups, please proceed to *Adding an Admission Group (Multiple Groups Not Enabled)*.

From the **Admission Groups** panel, click the **New** button to display the **Add Admission Group** dialog.

1. Enter a **Name** for the admission group together with the **Date Of Admission**. Alternatively, click the **Calendar** button and select the required date.

IMPORTANT NOTE: Please ensure that the **Date Of Admission** falls within the applicable academic year. We recommend that the date of admission is the day that the children will actually arrive in school, i.e. not a teacher training day.

2. Click the **OK** button to add the admission group and return to the **Intake Group Details** page.
3. If any further admission groups are required, click the **New** button in the **Admission Groups** panel and repeat steps 2 and 3.
4. Click the **Save** button to create the intake and admission groups.

Once admission groups have been created, you can add any applicants to SIMS and assign them to the required admission group.

Adding an Admission Group (Multiple Groups Not Enabled)

1. Clicking in the **Name** field provides a default name for the group, which can be overtyped as required.

2. Enter the **Date Of Admission** for the group.

05| Adding Intake and Admission Groups

3. Click the **Save** button to create the intake and admission group.
Once admission groups have been created, you can add any applicants to SIMS and assign them to the required admission group.

Completed

06 | Dealing with Leavers

Recording Leavers 39

Recording Leavers

This section provides a summary of the steps required to record leaver information in SIMS.

The facility to record leavers enables accurate records to be kept of pupils after they have left the school. During the Summer term you will need to mark most, or all of the pupils as leaving on the same day. You should only mark pupils as leavers if you are sure they are leaving, e.g. Year 6 pupils moving on to Secondary school.

IMPORTANT NOTES: *It is essential that you do not record leavers by removing their date of admission as this affects all historical data relating to that pupil.*

If someone who was a leaver subsequently returns, please ensure that you re-admit them – do not remove the date of leaving because this will affect the history (unless they had a date of leaving, but did not actually leave, i.e. changed their minds).

*To avoid validation failures when a statutory return is run, it is advisable to choose a **Date of Leaving** that is not a holiday or staff training day, i.e. a day when the pupil(s) can attend school.*

To ensure that information required for statutory returns, such as the School Census, is accurate and up-to-date, it is recommended that you check that all leavers have at least the minimum statutory information recorded before making them a leaver, e.g. Ethnicity.

1. Select **Routines | Pupil | Leavers** to display the **Find Student(s)** browser.
2. Search for the required pupil, then double-click their name to display the **Manage Student(s) Leaving Details** page.
3. If you wish to assign a group of pupils as leavers, search on the appropriate **Year** or **Reg Group** by selecting from the appropriate drop-down lists. Highlight the required pupils using any of the following methods:
 - To select all the pupils displayed in the browser, select **All** from the **Select** drop-down menu.
 - To select a group of pupils, highlight them using any of the following methods:
 - Hold down the **Ctrl** key and click each pupil to be selected.
 - To highlight sequentially listed pupils, click the first name in the list, hold down the Shift key, then click the last name in the list.
 - Once the required pupils have been highlighted, click the **Select** button to add them to the **Students** panel.

The selected pupils are then transferred to the **Students** panel.

Manage Pupil(s) Leaving Details

Save Print

1 Leaving Information 2 Students

1 Leaving Information

Date of Leaving: 22/07/2021 Reason for leaving: End of phase transfer - Maintair Assign to All

Destination after Leaving: Assign to Selected

Destination Institution: Grounds for Removal:

2 Students

Name	Year Group	Class	Adm. No.	Date of Admission	Date of Leaving	Reason for Leaving	Destination	Institution
Abhra, Abjit	6	6VC	001336	01/09/2013				
Abhra, Alisha	6	6VC	001337	01/09/2013				
Ackton, Stan	6	6KH	001339	01/09/2013				
Andrews, Josef	6	6KH	001399	01/09/2014				
Bailey, Eve	6	6VC	001400	01/09/2014				
Balinski, Cyla	6	6VC	001401	01/09/2014				
Balinski, Fil	6	6VC	001402	01/09/2014				
Balinski, Iwa	6	6KH	001403	01/09/2014				
Bennison, Hugo	6	6KH	001404	01/09/2014				
Bennison, Hugo	6	6KH	001457	01/09/2014				
Benson, Justin	6	6VC	001340	01/09/2013				
Berkley, Jack	6	6VC	001341	01/09/2013				
Burrows, Winston	6	6VC	001406	01/09/2014				
Carlson, Billy	6	6KH	001407	01/09/2014				
Clapson, William	6	6KH	001409	01/09/2014				
Constantinou, Jo...	6	6KH	001410	01/09/2014				
Conv. Max	6	6VC	001411	01/09/2014				

Remove Clear

4. In the **Leaving Information** panel, enter the **Date of Leaving** or click the **Calendar** button then select the required date.
5. Select the **Reason for leaving** from the drop-down list.
6. Enter the **Destination after Leaving**, if required. Alternatively, apply the **Reason for leaving** to one set of pupils (as described in the next step) then enter the **Destination after Leaving** for a different, or subset of pupils.
7. Search for and select the **Destination Institution**.
8. Select the **Destination Expected Start Date** from the Calendar.
9. Highlight the pupils to whom this information applies using the **Ctrl** and **Shift** keys then clicking their names (as described in step 3) then click the **Assign to Selected** button. If the information applies to all the pupils in the list, click the **Assign to All** button.
10. If an error has been made, highlight the pupil, correct the information in the **Leaving Information** panel then click the **Assign to Selected** button.
11. To remove a pupil from the list, highlight their name then click the **Remove** button.
12. To clear the contents of the **Date of Leaving**, **Reason for Leaving** and **Destination after Leaving** columns in the **Students** panel, highlight the required pupils, then click the **Clear** button. Re-enter the information as required.
13. Click the **Save** button to save the changes. The selected pupils are recorded with a date of leaving on the date specified.

Completed

07| Academic Promotion

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Setting up the Promotion Mapping for the New Academic Year

Setting up the promotion paths for the pastoral structure plays a key part in the end of year procedures and ensures that pupils move from their current year group and class into the correct year group in the new academic year. This process is used to set the path for year groups and classes, but it is also possible to specify a promotion path for individual pupils in case there are any exceptions (please see *Viewing/Setting the Promotion Path for Individual Pupils* on page 45).

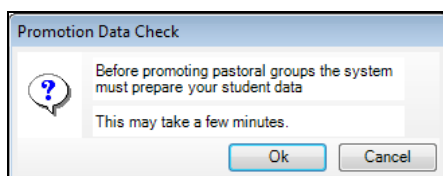
Setting the promotion mapping can be carried out at any point, as the promotion itself occurs at the beginning of the next academic year. However, it must be done before the start of the academic year.

You can repeat the process a number of times until you are happy that all pupils have been mapped to the appropriate classes.

BEFORE PROCEEDING: Please check that you have carried out the following:

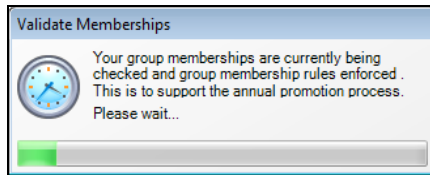
- Recorded any changes to teaching staff (added new teachers and added dates of leaving for any leavers).
- Created the new academic year.
- Amended your pastoral structure as required, such as adding new classes.

1. Select **Routines | School | Promotion** to display the **Promotion Data Check** dialog. You are advised that pupil data needs to be prepared (all current group memberships are checked and confirmed).

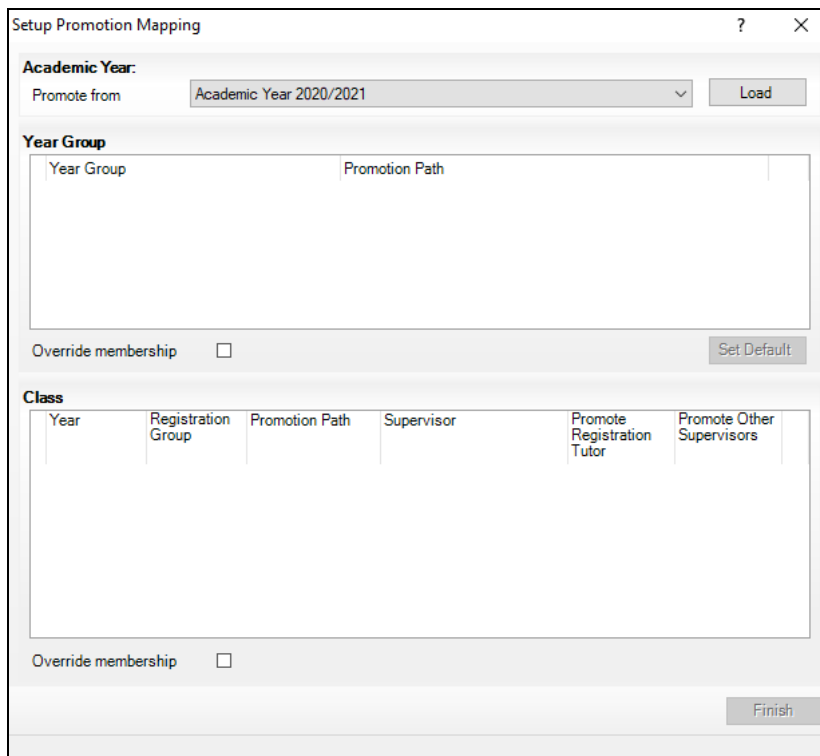


07| Academic Promotion

2. Click the **Ok** button to display the **Validate Memberships** message dialog, which shows the progress of the validation process.



This process may take some time to complete. Once the validation process is complete, the **Setup Promotion Mapping** dialog is displayed.



3. The current academic year should be selected automatically from the **Promote from** drop-down list. If it is not selected automatically, select it from the drop-down list, then click the **Load** button.

WARNING: *It is imperative that you select the correct academic year otherwise any changes made will affect the wrong year and it will be very difficult to rectify.*

4. The **Year Group** panel is populated with a default set of promotion paths (where one year is promoted to the next, i.e. Year 1 is promoted to Year 2 and so on). This is the same for both vertically or horizontally structured schools. If you wish to return to this setting at any point in the future, click the **Set Default** button.
5. Change the promotion path if required, by clicking the required year group in the **Promotion Path** column and then selecting the required year from the drop-down list.

NOTE: Schools that have a year group **N1** must ensure that this is mapped to **N2**.

Setup Promotion Mapping from Academic Year 2020/2021

Academic Year:
Promote from: Academic Year 2020/2021

Year Group

Year Group	Promotion Path
N1	N2
N2	R
R	1
1	2
2	3

Override membership

Class

Year	Registration Group	Promotion Path	Registration Tutor	Promote Registration Tutor	Promote Other Supervisors
Year N1	N1 AM		Ms Lisa Lawson	<input type="checkbox"/>	<input type="checkbox"/>
Year N1	N1 PM		Mrs Rebecca Lorrin	<input type="checkbox"/>	<input type="checkbox"/>
Year N2	PM		Ms Lisa Lawson	<input type="checkbox"/>	<input type="checkbox"/>
Year N2	AM		Mrs Rebecca Lorrin	<input type="checkbox"/>	<input type="checkbox"/>
Year R/Yea..	ELM		Mr Richard Perrin	<input type="checkbox"/>	<input type="checkbox"/>
Year R/Yea..	PINE		Mr Oliver Jovner	<input type="checkbox"/>	<input type="checkbox"/>

Override membership

If your school has a vertical structure, the years are displayed the same in the **Year** column as they are displayed in the following example.

Year	Registration Group	Promotion Path	Registration Tutor	Promote Registration Tutor	Promote Other Supervisors
Year N1	N1 AM		Ms Lisa Lawson	<input type="checkbox"/>	<input type="checkbox"/>
Year N1	N1 PM		Mrs Rebecca Lorrin	<input type="checkbox"/>	<input type="checkbox"/>
Year N2	PM		Ms Lisa Lawson	<input type="checkbox"/>	<input type="checkbox"/>
Year N2	AM		Mrs Rebecca Lorrin	<input type="checkbox"/>	<input type="checkbox"/>
Year R/Yea..	ELM		Mr Richard Perrin	<input type="checkbox"/>	<input type="checkbox"/>
Year R/Yea..	PINE		Mr Oliver Jovner	<input type="checkbox"/>	<input type="checkbox"/>

To facilitate the identification of year group names, drag the dividing line of the column heading to increase the size of the **Year** column.

- Review the promotion path for each class. The **Class** panel displays a list of the classes for the current academic year. Move down one class at a time by clicking in the **Registration Group** column, then select the class to which the pupil will be promoted from the **Promotion Path** column drop-down list. Repeat this process for all the classes in the **Class** panel.
- The **Registration Tutor** column displays the name of the current class tutor. If you want the tutor of the class to be promoted into the next academic year with the class, select the **Promote Registration Tutor** check box.

07| Academic Promotion

8. If any existing Classroom Assistants or Learning Support Assistants should be promoted into the next academic year with the class, select the **Promote Other Supervisors** check box.
9. Select the **Override Membership** check box in both the **Year Group** and **Class** panels the first time you carry out the promotion mapping process. This ensures that any existing memberships (however they were defined) are overwritten. If you repeat the promotion process, you can decide whether to overwrite the existing memberships by selecting the check box as required. For example, if you had originally stated that pupils in the **Pine** class should be promoted to the **Ash** class and subsequently wanted them to go from **Pine** to **Oak**, you would need to select the **Override Membership** check box in the **Class** panel.

IMPORTANT NOTE: *If you already carried out this process to set up your mappings and you now wish to edit them, please ensure that the **Override membership** check box is not selected if you wish to retain your previous settings.*

10. Click the **Finish** button and then **Save** the settings.
11. Click the **Map** button on the toolbar at any point to return to the **Setup Promotion Mapping** dialog.

SIMS displays the **Promote Pastoral Groups** page, which lists the current year groups.

Name	Unusual	Current Year Group	Next Year Group	Current Registration Group	Next Registration Group
⊕ Current Year Group: N2					
⊕ Current Year Group: R					
⊕ Current Year Group: 1					
⊕ Current Year Group: 2					
⊕ Current Year Group: 3					
⊕ Current Year Group: 4					
⊕ Current Year Group: 5					
⊕ Current Year Group: 6					

Viewing/Setting the Promotion Path for Individual Pupils

1. Double-click the current year group for which you wish to view or set individual promotion paths, to view the promotion path for each pupil.

Name	Unusual	Current Year Group	Next Year Group	Current Registration Group	Next Registration Group
+ Current Year Group: N2					
+ Current Year Group: R					
+ Current Year Group: 1					
- Current Year Group: 2					
Adams, Laura	<input type="checkbox"/>	2	3	2JB	3TO
Amnar, Tarak	<input type="checkbox"/>	2	3	2JB	3TO
Astwick, Gwenneth	<input type="checkbox"/>	2	3	2JB	3TO
Bond, Steve	<input type="checkbox"/>	2	3	2JB	3TO
Cameron, Zara	<input type="checkbox"/>	2	3	2GH	3CB
Carter, Hannah	<input type="checkbox"/>	2	3	2JB	3TO
Churchill, Martin	<input type="checkbox"/>	2	3	2JB	3TO
Cookson, Harry	<input type="checkbox"/>	2	3	2JB	3TO
Cosenza, Isabella	<input type="checkbox"/>	2	3	2JB	3CB
Defeo, Lorenzo	<input type="checkbox"/>	2	3	2JB	3TO
Dennis, Tommy	<input type="checkbox"/>	2	3	2GH	3CB
Dixon, Stephanie	<input type="checkbox"/>	2	3	2JB	3TO

2. You can customise the view on this screen by selecting an option from the **Customize** drop-down list.
 - Select **Sort** to display the **Sort** dialog, which enables you to order the contents of the columns, as shown in the following example.

Sort

Sort students by

Name Ascending Descending

Then by

Current Year Group Ascending Descending

Then by

(none) Ascending Descending

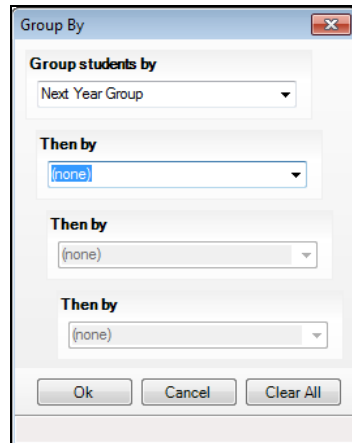
Then by

(none) Ascending Descending

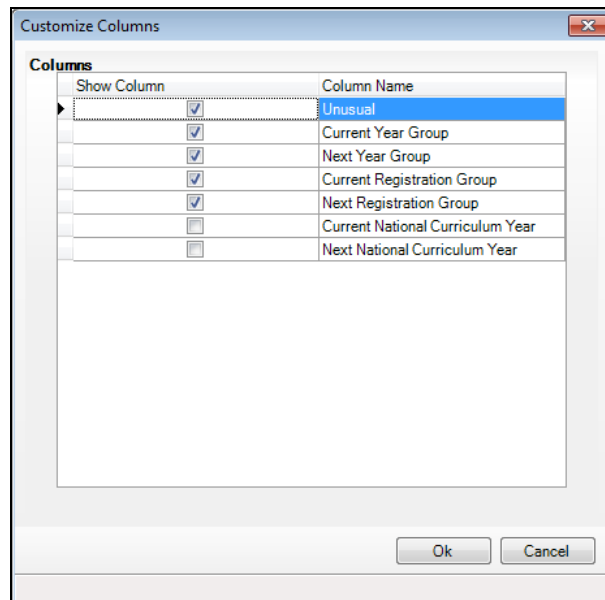
Ok Cancel Clear All

07| Academic Promotion

- Click the **Customize** button down arrow and select **Group By** to display the **Group By** dialog, which enables you to change the groupings, as shown in the following example.



- Select **Columns** to display the **Customise Columns** dialog, which enables you to choose the columns you wish to include in the display.



- Once expanded, you can change the year or class for individual pupils by clicking in the appropriate column and selecting a different year or class from the drop-down list. The change appears in red and the **Unusual** check box is selected automatically to indicate that the change falls outside the normal mapping set previously (using the **Setup Promotion Mapping** dialog). Repeat the process for any other pupils, if required.

Multiple pupils can be highlighted using any of the following methods:

- Hold down the **Ctrl** key, then click each pupil you wish to select.

Adams, Laura	<input type="checkbox"/>	2	3	2JB	3TO
Amnar, Tarak	<input type="checkbox"/>	2	3	2JB	3TO
Astwick, Gwenneth	<input type="checkbox"/>	2	3	2JB	3TO
Bond, Steve	<input checked="" type="checkbox"/>	2	3	2JB	3TO
Cameron, Zara	<input type="checkbox"/>	2	3	2GH	3CB
Carter, Hannah	<input checked="" type="checkbox"/>	2	3	2JB	3TO
Churchill, Martin	<input checked="" type="checkbox"/>	2	3	2JB	3TO
Cookson, Harry	<input type="checkbox"/>	2	3	2JB	3TO
Cosenza, Isabella	<input checked="" type="checkbox"/>	2	3	2JB	3TO
Defeo, Lorenzo	<input type="checkbox"/>	2	3	2JB	3TO
Dennis, Tommy	<input checked="" type="checkbox"/>	2	3	2GH	3CB
Dixon, Stephanie	<input type="checkbox"/>	2	3	2JB	3TO

- To highlight sequentially listed pupils, click the first name in the list, hold down the **Shift** key, then click the last name in the list.

NOTE: If the **Filter** button is deselected, all Year Groups and classes are available for selection from the drop-down lists, not just those that are associated with the chosen **Year Group** or **Class**.

For example, a pupil currently in **Year Group R** would normally be expected to promote into **Year Group 1**. It is possible (for whatever reason) that this pupil will actually be promoted into **Year Group 2** in the forthcoming academic year. To enable you to achieve this, click the **Filter** button and select the required **Year Group** and **Class** from the drop-down lists.

- Click the **Save** button to save the promotion mappings. The promotion occurs at the beginning of the next academic year. A warning is displayed if any unusual promotions have been set. Accept the warning by clicking the **Yes** button.

Completed

Checking the Registration Tutors Assigned

Once the promotion mapping process is complete, you are strongly advised to check the registration group assignments in the pastoral structure.

- Select **Focus | School | Pastoral Structure | Next Academic Year Structure**.
- Click the **+** icon adjacent to **Pastoral Structure** to reveal each registration group.

07| Academic Promotion

3. Right-click the name of each registration group and select **Properties** from the pop-up menu to display the **Class** dialog.
4. If necessary, add or change the **Registration Tutor** by clicking the **Browser** button, searching for and then selecting the required person. Click the **OK** button.
5. If two registration tutors share the group, click the **New** button adjacent to the **Supervisors** panel to display the **Supervisor Properties** table. Select the **Role** of **Joint Main Supervisor** from the drop-down list, then select the required person by clicking the **Browser** button, then searching for and selecting the required person from the **Select person** dialog. Click the **OK** button to confirm the selection.
6. Click the **OK** button to return to the pastoral structure, then click the **Save** button once you have assigned all the required registration tutors.

Completed

08 | Dealing with Applicants

Changing the Status of Applications to Offered or Accepted	49
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Changing the Status of Applications to Offered or Accepted

This section describes how to change the status of applications to your school for the forthcoming academic year in bulk. Applications can be added manually. When added, an application is automatically given a status of **Applied**. If required, you can then offer places to applicants you wish to join your school (**Offered**) and then change the status of the application to **Accepted** once you have received confirmation that they will be joining.

It is also possible to change the application status of individual applicants. For more information, please refer to the appropriate *Admissions* handbook.

This section assumes that you have added all of the required applicants via **Focus | Admission | Application**.

Finalising Offers

If you wish to offer places to applicants, please follow the instructions outlined in this section. If you do not want to record offers made, but wish to identify applicants who have accepted a place at your school, please proceed to *Accepting Applicants*.

1. Select **Routines | Admission | Finalise Offers** to display the **Find Intake Group** browser.

Name	Admission Year	Admission Season	Year Group	Planned Admission	Status
2021/2022 - Autumn Year N2	2021/2022	Autumn	Year N2	20	Active
2021/2022 Autumn Year R	2021/2022	Autumn	Year R	40	Active
2021/2022 Autumn Year N1	2021/2022	Autumn	Year N1	8	Active

08 | Dealing with Applicants

2. Search for, then double-click the required intake group to display the **Finalise Offers** page.

Late	Name	Gender	DOB	App. Status	Applied	Offered	Rejected
<input type="radio"/>	Bisset, Fearnie	Female	20/10/2016	Applied	✓		
<input type="radio"/>	Carson, Kaylee	Female	28/05/2017	Applied	✓		
<input type="radio"/>	Chandler, Brayden	Male	28/03/2017	Applied	✓		
<input type="radio"/>	Clarke, William	Male	17/05/2017	Applied	✓		
<input type="radio"/>	Deans, Elfyn	Male	02/05/2017	Applied	✓		
<input type="radio"/>	Edington, Tiffany	Female	12/03/2017	Applied	✓		
<input type="radio"/>	Juleson, Morgana	Female	17/02/2017	Applied	✓		
<input type="radio"/>	Luiz, Zuzana	Female	05/04/2017	Applied	✓		

The **Summary** panel displays figures for the **Planned Admission**, **Total Applicants** and the number of applicants who have **Applied**. Own Admission Authority schools are also provided with the **Late Applications** field.

Figures for the number of places **Offered**, **Accepted**, **Withdrawn**, **Admitted** and **Rejected** (Independent schools only) are updated as applicable information is edited and saved.

The **Applications** panel shows all the applicants who have applied for a place at your school, together with the status of their application.

3. To change the application status, click the required cell for each applicant, as shown in the following graphic.

Late	Name	Gender	DOB	App. Status	Applied	Offered	Rejected
<input type="radio"/>	Bisset, Fearnie	Female	20/10/2016	Applied		✓	
<input type="radio"/>	Carson, Kaylee	Female	28/05/2017	Applied		✓	
<input type="radio"/>	Chandler, Brayden	Male	28/03/2017	Applied		✓	
<input type="radio"/>	Clarke, William	Male	17/05/2017	Applied		✓	
<input type="radio"/>	Deans, Elfyn	Male	02/05/2017	Applied			✓
<input checked="" type="radio"/>	Edington, Tiffany	Female	12/03/2017	Applied		✓	
<input type="radio"/>	Juleson, Morgana	Female	17/02/2017	Applied	✓		
<input type="radio"/>	Luiz, Zuzana	Female	05/04/2017	Applied	✓		

Accepting Applicants

This section describes how to record applicants who have accepted a place at your school. This is achieved by changing the application status to **Accepted**.

The following instructions demonstrate how this can be achieved for all pupils in an intake group. It can also be achieved at individual pupil level via **Focus | Admission | Applicants**.

1. Select **Routines | Admission | Accept Applications** to display the **Find Intake Group** browser.

Name	Admission Year	Admission Season	Year Group	Planned Admission	Status
2021/2022 - Autumn Year N2	2021/2022	Autumn	Year N2	20	Active
2021/2022 Autumn Year R	2021/2022	Autumn	Year R	40	Active
2021/2022 Autumn Year N1	2021/2022	Autumn	Year N1	8	Active

2. Search for, then double-click the required intake group to display the **Accept/Decline Applications** page.

1 Summary

Planned Admission	<input type="text" value="20"/>	Accepted	<input type="text" value="0"/>
Total Applicants	<input type="text" value="11"/>	Withdrawn	<input type="text" value="0"/>
Applied	<input type="text" value="3"/>	Rejected	<input type="text" value="1"/>
Offered	<input type="text" value="7"/>	Admitted	<input type="text" value="0"/>

2 Applications

Current Application Status:

Name	Gender	DOB	Application Status	Offered	Accepted	Withdrawal
Baggley, Chris	Male	21/08/2016	Offered	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cadilla, Celia	Female	07/05/2016	Offered	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Dahl, Nashkabir	Female	30/06/2016	Offered	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Eagle, Ruby	Female	20/03/2016	Offered	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hackett, Charlie	Male	13/12/2015	Offered	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Idle, Dylan	Male	08/03/2016	Offered	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Jack, Jessica	Female	01/09/2015	Offered	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The **Summary** panel displays figures for the **Planned Admission**, **Total Applicants** and the number of applicants who have **Applied** for, or been **Offered**, a place at your school.

Figures for the number of places **Offered**, **Accepted**, **Withdrawn**, **Admitted** and **Rejected** (Independent schools only) are updated as applicable information is edited and saved.

The **Applications** panel displays by default, all applicants with an application status of **Offered**. The display includes the **Name**, **Gender**, date of birth (**DOB**) and **Application Status** of each applicant, together with a tick grid that enables the application status to be amended.

08 | Dealing with Applicants

- Click the **Accepted** column for each applicant who has accepted a place at your school. To accept, click in the cell to put a tick in it. To withdraw, click the **Withdraw** column.

2 Applications							
Current Application Status: Offered							
Name	Gender	DOB	Application Status	Offered	Accepted	Withdrawal	
▶ Bagley, Chris	Male	21/08/2016	Accepted		✓		
Cadilla, Celia	Female	07/05/2016	Accepted		✓		
Dahl, Nashkibir	Female	30/06/2016	Accepted		✓		
Eagle, Ruby	Female	20/03/2016	Offered	✓			
Hackett, Charlie	Male	13/12/2015	Accepted		✓		
Idle, Dylan	Male	08/03/2016	Accepted		✓		
Jack, Jessica	Female	01/09/2015	Offered	✓			

- If you wish to accept applicants with a status of **Applied**, select **Applied** from the **Current Application Status** drop-down list and follow this same process.
- Once complete, click the **Save** button to save the changes. The **Application** panel refreshes its display and shows only those applicants with an application status matching that selected in the **Application Status** drop-down list. In most cases, the list is empty.

Completed

Allocating Applicants to Registration Groups/Classes

Before allocating applicants to classes, you must have:

- added the applicants by clicking the **Application** icon on the toolbar or selecting **Focus | Admission | Application**, or imported via CTF.



Application icon

- changed the applicant's application status (please see *Changing the Status of Applications to Offered or Accepted* on page 49) to **Offered** or **Accepted**.
- Select **Focus | School | Pastoral Structure | Next Academic Year Structure** to display the **Next Academic Year Pastoral Structure** page. The **Effective Date** defaults to the start date of the next academic year. Whilst it is possible to change this date to view information, the default date must be used so that information can be edited.
 - Expand the **Pastoral Structure** until the **Registration Group** folder is visible under the required year.
 - Right-click the applicable **Registration Group** folder and select **Members** from the pop-up menu to display the **Allocate Students/Applicants** dialog.

The **Name**, **Gender**, current **Year Group** and current **Reg Group** are displayed for each applicant together with the total number of applicants allocated to each class (at the bottom of the grid). Right-click any column heading to change the order.

Effective Date Range

From effective date to end of the academic year (Over the whole academic year (02/09/2021 - 01/09/2022)

Student Status

Students Accepted Applications Current Applications (Applied / Offered / Reserved)

Members

Name	Gender	Year Group	Reg Group	PM	AM
Abhra, Abjit	Male	Year N2	AM		✓
Abhra, Alisha	Female	Year N2	PM	✓	
Abhra, Neel	Male	Year N2	PM	✓	
Ackton, Stan	Male	Year N2	AM		✓
Beiber, Justin	Male	Year N2	AM		✓
Berkley, Jack	Male	Year N2	PM	✓	
Del Sonno, Nadia	Female	Year N2	AM		✓
DiCalvi, Pasquale	Male	Year N2	AM		✓
DiMichele, Sara	Female	Year N2	PM	✓	
Ebi, Danesh	Male	Year N2	PM	✓	
Enlai, Cheng	Male	Year N2	PM	✓	
Total				10	10

Print Actions

OK Cancel

The **Student Status** section enables you to limit the applicants displayed in the grid, as follows:

- **Students** – select this check box to display any on-roll pupils who have been assigned to any class within the selected year. These pupils are displayed with a grey background.
- **Accepted Applications** – select this check box to display any applicants who have an application status of **Accepted** (i.e. they have accepted a place at your school). These applicants are displayed with a pink background.
- **Current Applications** – select this check box to display any applicants who have an application status of **Offered** (i.e. they have been offered a place at your school). These applicants are displayed with an orange background.

NOTE: Although you can specify which class the applicants will go in, the applicants must be admitted (via **Routines | Admission | Admit Applications**) before they become a member of this class.

Additional columns (**House**, **Ethnicity**, **Previous School**, **Admission no.** and **Date of Birth**) can also be displayed on the grid by selecting the appropriate option from the **Actions** drop-down menu.

It can be useful to change the view to **View Triple**, which displays a breakdown of totals for females and males in each group.

08 | Dealing with Applicants

4. Select the required class for each applicant in the grid by clicking the appropriate cell to display a tick. Clicking the cell again removes the tick.
5. Once you have selected classes for each the applicants, click the **OK** button to save the changes.

Completed

09 | Producing Class Lists for the New Year

Printing Class (Registration Group) Lists for the New Academic Year .. 55

Printing Class (Registration Group) Lists for the New Academic Year

Class (Registration Group) lists can be easily produced using any of the following pre-defined reports:

- Registration Groups (Dated)
- Registration Groups (Dated – DOB Sort)
- Registration Groups (Dated – Gender Sort)
- Registration Groups (Dated with Columns).

If these reports do not exist on your system, you need to import the latest pre-defined reports. For more information, please refer to the *Designing and Running Reports* handbook.

1. Select **Reports | Run Report** to display the **Report** browser.
2. Expand the **Student** focus and double-click the required pre-defined report, e.g. **Registration Groups (Dated)**, to display the **Enter parameter values for report** dialog.

3. Deselect the **Bypass effective date** check box.

09 | Producing Class Lists for the New Year

4. Enter the required date or click the **Calendar** button and select the required date.
5. Select the required **Year Group(s)** and **Registration Group(s)**, then click the **OK** button to produce the required report.

Registration Groups (Dated) Report

Registration Groups (Dated)		
Registration Groups (Dated)		
Registration Group: 2GH		
Tutor:	Mrs G Grosvenor	
Room:	n/a	
Effective date:	25/03/2021	
Name	Gender	Date of Birth
Ackton Charlotte	F	10-02-2014
Alala Michael	M	12-04-2014
Coopers Ryan	M	15-04-2014
Cooper-Smith Beatrice	F	14-01-2014
Coulter Sadie	F	20-02-2014
Coulton Emma	F	20-07-2014
Daniela Bryn	M	20-11-2013
Delanva Millicent	F	10-02-2014
Jones Travis	M	15-05-2014
Kaur Amara	F	12-01-2014
Kaur Safia	F	21-06-2014
Keeter Louis	M	12-03-2014
Khana Mariam	F	17-02-2014
Lin Jian	M	22-01-2014
Ludovak Marika	F	17-02-2014
Ludwika Karina	F	12-12-2013
Maciei Antoni	M	10-04-2014
Martin Araminta	F	02-01-2014
Micheals Adam	M	10-06-2014
Morgans Iris	F	22-03-2014
Nowak Rona	F	07-03-2014
Patterson Tiffany	F	20-05-2014
Reeve Nicholas	M	14-03-2014
Simons Madeline	F	06-12-2013
Sloane Alexandra	F	03-04-2014
Vinhan Satvinder	M	22-05-2014
Whitemore Paige	F	29-11-2013
Zheng Dequan	M	03-01-2014
Total: Males	11	
Total: Females	17	
Group Total:	28	

Registration Group (Dated – DOB Sort)

As per the Registration Groups (Dated) report but in Date of Birth order.

Registration Group (Dated – Gender Sort)

As per the Registration Groups (Dated DOB Sort) report but in Gender order.

Registration Group (Dated – With Columns)

As per the Registration Group (Dated) report but with five additional blank columns.



10 | Academic Management (Primary Curriculum)

Academic Management (Primary Curriculum) End of Year Processes ... 57

Academic Management (Primary Curriculum) End of Year Processes

The Primary Curriculum module is a tool that allows schools in the Primary sector to create teaching groups by combining and re-allocating pupils from different classes or years, or by dividing up the pupils of a single class. If you have created teaching groups for the current academic year using Primary Curriculum and wish to use a similar system next year, you need to recreate these groups for the new academic year. Unlike the Pastoral Structure, academic structures are bound to specific Academic Years. So even if next year's Literacy sets look exactly like the ones in use this year, they must in fact be a different set of teaching groups, and defined within a new 'scheme'. This can be done at any point either before or after the new academic year begins, but after the promotion path has been created. The groups created within previous academic years can still be accessed by changing the academic year selected via **Tools | Academic Management | Set Academic Year**.

1. In order to create or edit teaching groups for an academic year other than the current one, select the required academic year via **Tools | Academic Management | Set Academic Year**.
2. Create new curriculum schemes and within them, the required teaching groups via **Focus | School | Academic Structure | Edit Curriculum Structure**.
3. Allocate pupils to their teaching groups via **Focus | School | Academic Structure | Curriculum Assignment by Scheme**. This needs to be done after pupils have been allocated to their new registration groups, using the promotion path.

The process of creating teaching groups is described in detail in the *Academic Management for Primary Schools* handbook. A Quick Start Guide is also provided as an appendix in the same handbook.

11 | After the New Academic Year has Started

After the New Academic Year has Started 59

After the New Academic Year has Started

The following routines should be undertaken once the new academic year has been started.

- In SIMS, admit applicants (please see *Admitting Applicants* on page 59).
- In SIMS, record any re-admission pupils (please see *Re-Admitting Pupils* on page 61).

Admitting Applicants

Applicants should be admitted on the first day that they actually arrive at the school. If, however, you have been contacted by a parent who explains why their child will not be able to start on the specified date, you can agree a new start date for that applicant.

*NOTE: Guest pupils will be admitted and a pupil record created. They will not have an admission number (because they are a guest) and therefore, will not appear on-roll. They can be selected from the **Find Pupil** browser (via **Focus | Pupil | Pupil Details**) by selecting **Guest** from the **Status** drop-down list.*

For more detailed instructions, please refer to the appropriate *Admissions* handbook.

1. Select **Routines | Admission | Admit Applications** to display the **Find Intake Group** browser.
2. Search for and then double-click the required intake group to display the **Admit Applicant Detail** page.

The **Summary** panel displays read-only statistics about the selected intake group as shown in the following graphic.

Summary			
Total Applicants	<input type="text" value="7"/>	Accepted	<input type="text" value="5"/>
Planned Admission	<input type="text" value="20"/>	Withdrawn	<input type="text" value="1"/>
Applied	<input type="text" value="0"/>	Rejected	<input type="text" value="0"/>
Offered	<input type="text" value="0"/>	Admitted	<input type="text" value="1"/>

Total Applicants	The number of applicants who have applied for a place in this intake group.
Planned Admission	The original number of new applicants intended for this intake group.

11 | After the New Academic Year has Started

Applied	The number of applicants who have applied for places in this intake group.
Offered	The number of applicants offered places in this intake group.
Accepted	The number of applicants who have accepted places in this intake group.
Withdrawn	The number of applicants who have withdrawn their application.
Rejected	The number of rejected applications in this intake group (Independent schools only).

The **Applications** panel displays by default, all applicants with an application status of **Accepted**. The display includes the **Name, Gender, Date of Birth, proposed Date of Admission, Enrolment Status, Application Status, UPN** and whether a UPN will be assigned. A tick grid is provided, enabling the application status to be amended as required. The order of the display can be changed by clicking any column heading.

2 Applications										
Application Status: Accepted <input type="button" value="Assign Permanent UPN"/> <input type="button" value="Admit All"/>										
Name	Gender	Date Of Birth	Date Of Admission	Enrolment Status	Application Status	UPN	Assign UPN	Admitted	Withdrawal	
Atkins, Eve	Female	28/07/2018	06/09/2021	Single Registration	Accepted		No Change			
Birkett, Scott	Male	03/03/2018	06/09/2021	Single Registration	Accepted		No Change			
Cardale, Luke	Male	17/05/2018	06/09/2021	Single Registration	Accepted		No Change			
Carmichael, Meghan	Female	21/06/2018	06/09/2021	Single Registration	Accepted		No Change			
Ciobanu, Mitica	Male	23/09/2017	06/09/2021	Single Registration	Accepted		No Change			
Clifton, Rhianna	Female	25/04/2018	06/09/2021	Single Registration	Accepted		No Change			
Dickinson, Adam	Male	05/12/2017	06/09/2021	Single Registration	Accepted		No Change			
Henson, Tameka	Female	22/01/2018	06/09/2021	Single Registration	Accepted		No Change			

- If you wish to admit applicants with a different application status (such as **Offered**), select it from the **Application Status** drop-down list, then follow the remainder of this process.
- If you need to add UPNs, click the **Assign Permanent UPN** button. The **Assign UPN** column is then populated with **Assign Permanent UPN**.
- To edit individual applicants, select the required value from the drop-down list in the **Assign UPN** column, e.g. **No Change** (if the applicant already has a UPN) or **Assign Temporary UPN**.
 - Permanent UPNs are issued to new applicants only when it is believed that they have never previously been allocated a UPN, or to replace a temporary UPN.
 - Temporary UPNs are issued to an applicant only when a school does not know their permanent UPN (e.g. the school is awaiting a transfer file or awaiting an applicant's information).



Application icon

- If you intend to admit all the applicants in the selected intake group, click the **Admit All** button. Alternatively, click in the **Admitted** column adjacent to each applicant you wish to admit. The most effective method is to click the **Admit All** button and edit any exceptions.

Name	Gender	Date Of Birth	Date Of Admission	Enrolment Status	Application Status	UPN	Assign UPN	Admitted	Withdrawal
Alkins, Eve	Female	28/07/2018	06/09/2021	Single Registration	Admitted		No Change	✓	
Birkett, Scott	Male	03/03/2018	06/09/2021	Single Registration	Admitted		No Change		
Cardale, Luke	Male	17/05/2018	06/09/2021	Single Registration	Withdrawal		Assign Permanent UPN Assign Temporary UPN		✓
Carmichael, Meghan	Female	21/06/2018	06/09/2021	Single Registration	Admitted		No Change	✓	
Ciobanu, Mitica	Male	23/09/2017	06/09/2021	Single Registration	Admitted		No Change	✓	
Clifton, Rhianna	Female	25/04/2018	06/09/2021	Single Registration	Admitted		No Change	✓	
Dickinson, Adam	Male	05/12/2017	06/09/2021	Single Registration	Admitted		No Change	✓	
Harvey, Tommie	Female	23/01/2018	06/09/2021	Single Registration	Admitted		No Change	✓	

- Once complete, click the **Save** button to admit the applicants. The **Application** panel refreshes its display and shows only those applicants with an application status matching that selected in the **Application Status** drop-down list. In most cases, the list is empty.



Completed

Re-Admitting Pupils

This section contains a summary of the required steps. For detailed instructions, please refer to the appropriate *Admissions* handbook.

Any pupils who have left your school and then subsequently return, must be re-admitted rather than added to the system again. This ensures that the pupil's educational **History** is maintained.

IMPORTANT NOTES:

*It is essential that you follow this process for re-admissions (i.e. for pupils who have left your school and subsequently return). Do not remove the **Date of Leaving** as a method of re-admitting. However, if the pupil was originally leaving and changes their mind, i.e. they do not actually leave, then you should remove their **Date of Leaving**.*

*It is acceptable for there to be a gap between the date of leaving and the date of return and this will be reflected in SIMS if it is the case (for example, if the pupil leaves in July but returns in September). If you do not want any gaps in the associated class memberships, then you will need to edit the history via **Focus | Pupil | Pupil Details** page by clicking the **History** button in the **Registration** panel.*

- Select **Focus | Pupil | Pupil Details** to display the **Pupil Details** page.
- Click the **New** button to display the **Add Student** page.
- Enter the pupil's known details into the **Basic Details** panel, then click the **Continue** button. A list of **Matched People** matching the search criteria entered is displayed.
- Highlight the required pupil and click the **Open** button to display a warning message **The selected pupil is a Leaver, do you want to re-admit the Pupil?**

11 | After the New Academic Year has Started

5. If you are certain that this is the pupil who should be re-admitted, click the **Yes** button to display the pupil's details.
6. Add/edit further details as required, then click the **Save** button. All mandatory fields are highlighted in red and must be completed before you are able to finally save the pupil's details.
7. Click the **Save** button again if any additional data has been added.



In SIMS Attendance - Using the Part-Time Pupils Routine to Add Not Required Codes

The sessions when part-time pupils, i.e. pupils of non-statutory school age, are not required to attend school can be specified using this routine. SIMS then applies the Non-compulsory school-age absence code (X) to the sessions that occur during the specified date range. The Week Range dates must lie within the new academic year and we would advise that you use the working academic year dates as explained in the following example.

The part-time pupil functionality is available via a dedicated menu route (**Tools | Setups | Attendance Setup | Part Time Pupils**). To ensure that the dedicated menu route is available, select the **Show Part-time Pupils** check box in the **Visibility Switches** panel.

1. Select **Tools | Setups | Attendance Setup | Part Time Pupils** to display the **Part Time Pupils** page.

Short Name	Description
AM	AM only
PM	PM only

Select All Deselect All

Enter 'Not Required' codes

Attendance required in mornings only Attendance required all day
 Attendance required in afternoons only Apply a weekly pattern of Not Required codes

Mon AM	Mon PM	Tue AM	Tue PM	Wed AM	Wed PM	Thu AM	Thu PM	Fri AM	Fri PM
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2. Specify the date range appropriate to the period for which your chosen group will be part-time. The dates must lie within the academic year.

- Highlight the required groups (using **Ctrl** or **Shift** to highlight multiple groups). The **Select All** and **Deselect All** button can also be used if required.
- Specify when attendance is required by selecting one of the radio buttons.

Enter 'Not Required' codes

Attendance required in mornings only
 Attendance required all day
 Attendance required in afternoons only
 Apply a weekly pattern of Not Required codes


- Attendance required in mornings only
- Attendance required in afternoons only
- Attendance required all day
 Select this option when a part-time pupil starts full-time school. All 'Not Required' codes for the pupil are removed from the system.
- Apply a weekly pattern of Not Required codes
 Select this option if a mixture of AM and PM sessions is required. The associated grid is then enabled. Select the check boxes that represent the sessions when the pupils are not required to attend school.

In the following example, the pupils are expected to attend Monday, Tuesday, Thursday and Friday morning, and all day on Wednesday.

	Mon AM	Mon PM	Tue AM	Tue PM	Wed AM	Wed PM	Thu AM	Thu PM	Fri AM	Fri PM
I	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

- Existing marks can be protected or overwritten. This is achieved by clicking the **Preserve/Overwrite** toggle button.

 **Preserve** Preserve toggle button

 **Overwrite** Overwrite toggle button

*NOTE: If the **Overwrite** button is selected, SIMS saves the specified pattern of marks (overwriting any existing marks), for all sessions in the selected range of weeks.*

- Click the **Apply** button to apply the codes to the selected part-time pupils.

12 | Housekeeping Routines

Running Housekeeping Routines in SIMS 65

Running Housekeeping Routines in SIMS

Now is a good time to carry out some general housekeeping routines in SIMS. For more information, please refer to the *Setting Up and Administering SIMS* handbook.

Archiving Attendance Marks

To improve the performance of SIMS when viewing and editing attendance marks, session marks can be archived via **Tools | Housekeeping | Archive Attendance Marks | Archive**. All marks, with the exception of those recorded in the current academic year and the preceding academic year, can be archived.

NOTE: Attendance marks cannot be edited once archived.

For further information on archiving attendance marks, please refer to *Archiving Attendance Marks* in the *Housekeeping Routines* chapter of the *Managing Pupil/Student Attendance* handbook.

Adding/Removing Users from SIMS Online Services Products

Applicable to users of SIMS Online Services products only (e.g. SIMS Parent)

Users of SIMS Online Services can be managed on the **Manage Users** page of Product Admin (<https://admin.sims.co.uk>).

It is recommended that the following actions are taken over the summer holidays or early in the academic year:

- Invite staff members joining the school
- Invite pupils joining the school
- Invite parents of pupils joining the school (except parents who have other children in the school already).

NOTE: Invitations are valid for 90 days from the date they are sent out. Parents of pupils who are accepted applicants are able to register to use SIMS Online Services. However, they are not able to access Data Collection functionality until their child is on roll.

When a pupil or staff member is marked as a leaver in SIMS the information cascades automatically through the system and updates SIMS Online Services products ensuring the leaver is unregistered.

Parents can be unregistered via SIMS ID only.

12| Housekeeping Routines

For more information, please refer to the **Help Centre** via the **SIMS Parent for Schools** documentation centre (https://support.capitasoftware.com/csm?id=kb_article_view&sysparm_article=KB0036841).

13 | Frequently Asked Questions (FAQs)

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Creating the Next Academic Year

When should I create the next academic year?

The next academic year can be created soon as the current academic year has begun. It can be edited once more information has been discovered. If the pastoral structure is not known for the next academic year, it is possible to edit it at a later date.

Does the new year have to start on 1 September?

It is possible to start the new year on any day after the end of the previous Summer term. It is advisable to ensure that the Assessment and Profile reports of all current years have been run prior to the first day of the new academic year.

What happens if I don't know all of the information yet (e.g. next year's form tutors, form names, leavers, holidays, etc.)?

You can set up the academic year without this information and then edit it at a later date via the **Edit Academic Year** wizard, the **School Diary** and the **Next Academic Year Pastoral Structure**. The only critical date is the first day of the new academic year. Leaving dates can be added at any time after the setup of the new academic year.

Academic Promotion

What is the easiest way of promoting my academic classes from one year to the next?

For groups that will stay the same from one year to the next (e.g. Year 4 to Year 5), you can apply the **Academic Promotion Rules** by navigating to **Routines | School | Academic Promotion Rules**, then promote pupils from the curriculum assignment page. For subject sets, the curriculum assignment 'tick grid' can be exported. Heads of Department can then identify in which class each pupil will be allocated and have the information re-imported. All other classes can be created from the same area.

What do I do if some Nursery pupils are not being promoted to the next year group?

You can use the **Pastoral Promotion** process or the **Pastoral Structure** to identify that these pupils will remain in the same year group for the following year.

Can I make changes once I have done the initial promotion?

Yes. It is possible to run the promotion as many times as is necessary.

If I run pastoral structure early, will pupils starting afterwards still be included?

No. You will need to re-run the promotion to include the new starters.

Forms and Timetables

When can I import the new timetable?

It is possible to import the new timetable as soon as the new academic year has been set up. It is advisable for all classes to exist and be named appropriately but they do not have to be scheduled.

Can I print timetables for all pupils who are at the school before the start of the new academic year?

Yes. On the **Timetable** screen, you have an effective date. Move this format to the start of the next academic year. The timetables can be printed or emailed if you are using InTouch.

If the students are mixed up for next year's forms, what is the easiest way to assign them to their new form group?

You are advised to use the **Next Academic Year Pastoral Structure**. This provides a grid where all students can be viewed and added to form groups without the need to go into each individual record.

Can I print new form lists before the new year starts?

Yes, by navigating to **Reports | Student List | Class List** and editing the **Effective Date** field in the **Select classes** dialog to a date in the next academic year. pupils will be listed in the new forms and all accepted applicants will then be included.

I need to change the form group name because a teacher is leaving. Can I overwrite the name?

No, because this affects the history of the group. You should create a new registration group to replace the old one.

Dealing with Applicants

Can I allocate my Accepted Applicants to their classes before they are admitted to the school?

Yes. The current students and accepted applicants can be allocated to classes before the start of the next academic year.

Dealing with Leavers

Can I add leaving dates for pupils early and will it affect their current record?

It is possible to add leaving dates as soon as you are provided with the information. This does not affect their record in any way. If a pupil does not actually leave, or withdraws their notice to leave, the leaving date can be deleted.

Billing

Can I bill my Accepted Applicants for the Autumn term before they are admitted to the school?

Yes. Applicants can be billed as soon as they have accepted their place.

Can I print the registration group for the next academic year on the bill?

Yes, provided that the applicants have been allocated a registration group and your current pupils have been promoted, then it is possible to specify the membership date when printing or emailing bills.