

**SIMS**

**Producing the  
School Census  
Summer 2021  
Return**

**English  
Secondary/Middle  
deemed Secondary  
Schools**

**applicable to 7.198 onwards**

**Handbook**

## Revision History

Version	Change Description	Date
7.198 - 1.0	Initial release.	09/03/2021

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

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# 01 | Introduction

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## Overview

This handbook provides the information needed by Secondary/Middle deemed Secondary schools in England to complete the School Census Summer 2021 Return, which takes place on Thursday 20 May.

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

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

A list of items collected from Secondary/Middle deemed Secondary schools in England for the School Census Summer 2021 Return is available in a later section of this handbook (please see Preparing Data for the School Census Return on page 6).

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

## How has the School Census Summer Return Changed?

Changes to the School Census Summer Return include the following:

- Census date 20/05/2021
- Attendance collected from 01/01/2021 to 04/04/2021
- Exclusions collected from 01/08/2020 to 04/04/2021
- Free School Meal Eligibility collected from 22/01/2021 to 20/05/2021
- Learner Support collected from 01/08/2020 to 20/05/2021.

## Reporting School Dinners Taken on Census Day

### Routines | Statutory Returns | School Census - School Dinner Taken

If pupils in years R, 1 and 2 are not attending school on the School Census Summer 2021 census day, schools can now select an alternative date for reporting of school dinners taken between 05/04/2021 and 31/07/2021. In Special schools, this is also applicable to pupils aged between 4 and 6 who are not following the National Curriculum Year X, and pupils born between 1 September 2013 and 31 August 2016 inclusive.

## De-Activation of the 'Other' Exclusion Reason

### Tools | Lookups | Maintain

The **Other** lookup value in the **Exclusion Reason** lookup type has been set to inactive because from September 2020 onwards, it should not be recorded.

## Collection of School Attendance Information

### Not applicable to Nursery schools

- For schools that use Attendance, data is collected on all categories of school attendance, rather than just absence.
- For schools that do not use Attendance, it is possible to record the following information:
  - Total number of sessions attending approved educational activity (**T AEA Sessions**) *This information was also collected in the School Census Spring 2021 Return*
  - Total number of sessions unable to attend due to exceptional circumstances (**T Excep Sessions**) *This information was also collected in the School Census Spring 2021 Return*
  - Total number of sessions unable to attend due to Coronavirus (**T Corona Sessions**) *This information was also collected in the School Census Spring 2021 Return.*

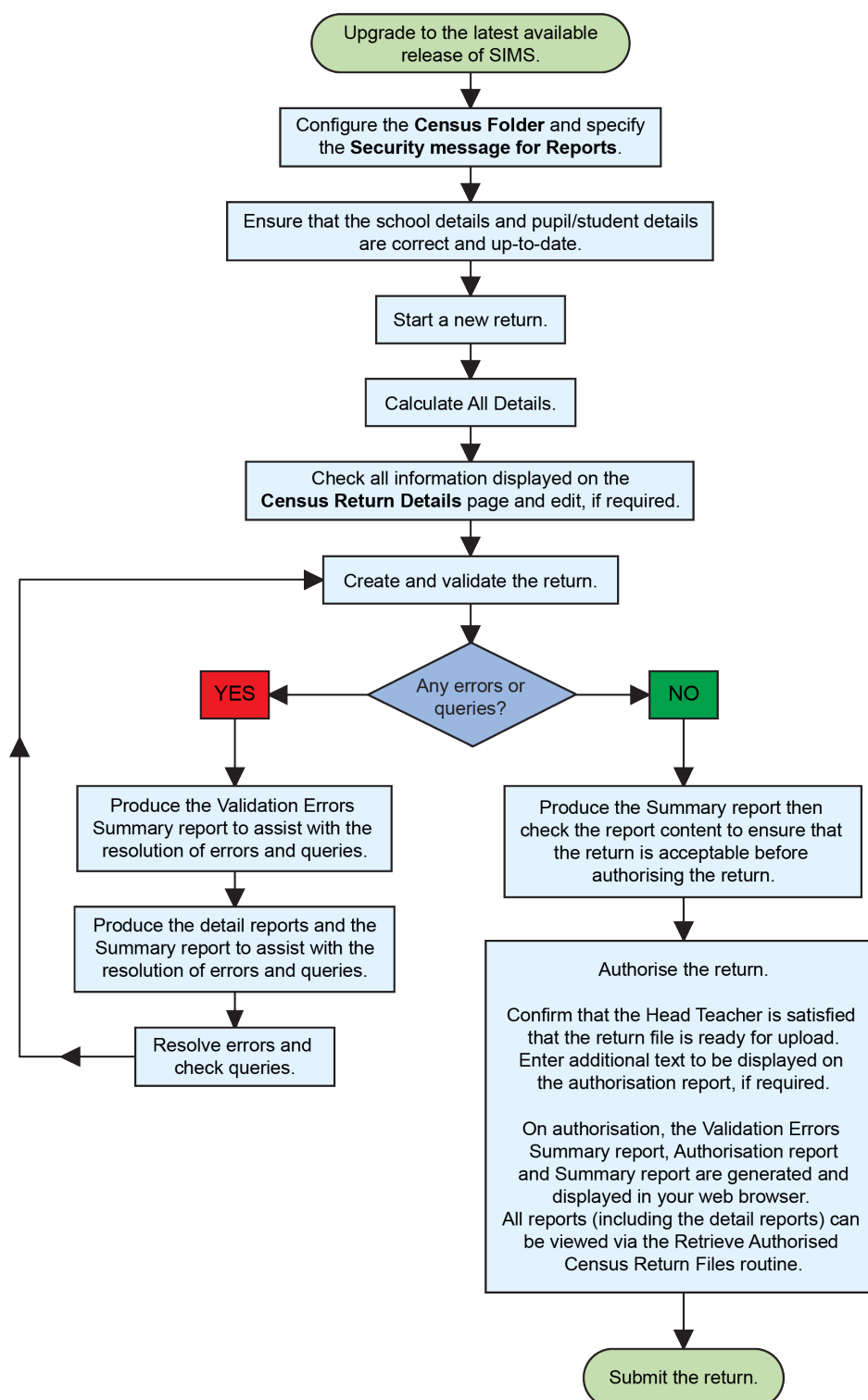


### More Information:

*Entering Attendance Information on page 21*

## Steps to Producing the School Census Return

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



## 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.

### Additional Information

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

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

The SIMS Newsfeed - Hub provides links to all the statutory returns related newsfeeds

([https://support.capitasoftware.com/csm?id=kb\\_article\\_view&sysparm\\_article=KB0035899](https://support.capitasoftware.com/csm?id=kb_article_view&sysparm_article=KB0035899)).

- SIMS Newsfeed - School Census Summer 2021
- SIMS Newsfeed - DfE CBDS 2020/21
- SIMS Newsfeed - Course Management for SIMS 7 Spring Release 2021
- SIMS Newsfeed - Series 1800 Filesets for SIMS 7 Spring Release 2021.



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## Setting SIMS Permissions

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

### Running the Return

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

- Returns Manager
- Returns Operator.

### Editing and Preparing Data

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

### Permissions Required to Import a Revised Fileset

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

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

- Returns Manager
- System Manager.

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

## Where to find More Information about Permissions

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

An Excel spreadsheet describing the numerous permissions available in SIMS is available on the support portal ([https://support.capitasoftware.com/csm?id=kb\\_article\\_view&sysparm\\_article=KB0044069](https://support.capitasoftware.com/csm?id=kb_article_view&sysparm_article=KB0044069)).

## What Version of SIMS is Required?

To run the return, you must have the SIMS 2021 Spring Release (7.198) or later installed.

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

The version should read 7.198 or later.



## Preparing Data for the School Census Return

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

The following information is collected from Secondary/Middle deemed Secondary schools for the School Census Summer 2021 Return.

### School Level

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

**Student Level**

- Student Identifiers:
  - unique pupil number (UPN) and former UPN, unique learner number (ULN)
  - surname, forename, middle names, former surname, preferred surname
  - date of birth and gender.
- Student Characteristics:
  - first language
  - post looked after arrangements
  - free school meal eligibility start date, end date and UK country in which the eligibility applies
  - top-up funding indicator, funded hours, extended childcare hours, 30 hour code, disability access fund indicator and hours at setting (**applicable to schools with students of the applicable age**)
  - service children in education indicator
  - Youth Support Services Agreement (YSSA) indicator and Learner Support code.
- Status: enrolment status, date of entry, date of leaving, part-time indicator, boarder indicator and actual national curriculum year group.
- Special Educational Needs: SEN Provision, member of SEN unit (sometimes called special class) indicator and member of resourced provision indicator.
- Termly Exclusion Information (01/08/2020 to 04/04/2021): exclusion category, reason for exclusion, SEN provision (formerly stage), exclusion start date and actual number of sessions excluded from.
- Home Information: Student's home address, including post code and unique property reference number (UPRN).
- Termly Attendance Information (01/01/2021 to 04/04/2021): Possible Sessions, sessions missed due to authorised absence, sessions missed due to unauthorised absence, attendance codes and number of sessions missed.

For more information and instructions on all of the preparations that need to be carried out before the census return is produced, please refer to the appropriate *Preparing for the School Census Summer 2021* guide.

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



# 03 | Producing the School Census Summer Return

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## Creating a New School Census Return

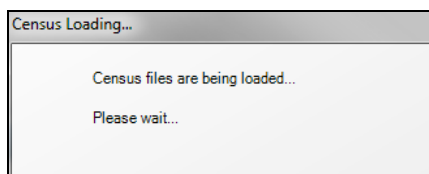
Before creating a new return, ensure that all student and school information is present and accurate in SIMS.

The School Census Summer 2021 Return collects data for:

- all students on the register on census day (20/05/2021).
- any additional students not on-roll on census day who:
  - had a permanent exclusion with a final review that started between 01/08/2020 and 04/04/2021.
  - were on-roll for at least one session during the collection period from 01/01/2021 and 04/04/2021.
  - were awarded Learner Support funding from 01/08/2020 to 20/05/2021.

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

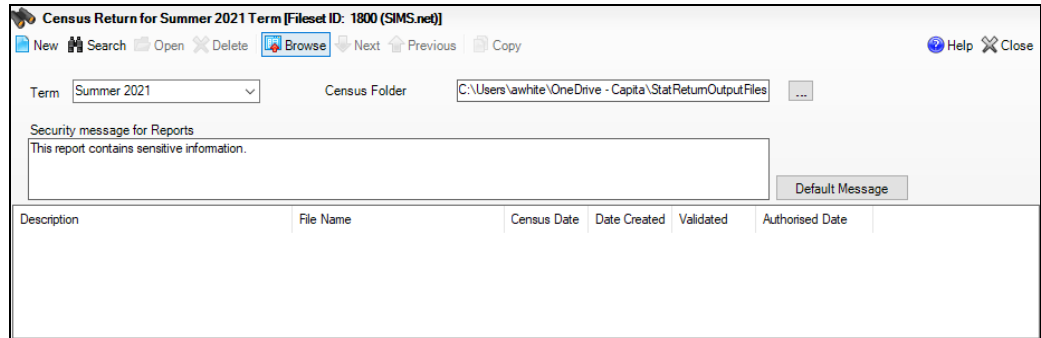
1. Select **Routines | Statutory Returns | School Census** to load the School Census validation and reporting files.



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

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



By default, **Summer 2021** is displayed in the **Term** field.

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

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



#### **More Information:**

*Deleting an Unauthorised Return on page 40*

*Specifying the Security Message for Reports on page 11*

## Configuring the Census Folder

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

**IMPORTANT NOTES:** Due to the sensitive nature of some of the data stored in SIMS, careful consideration must be given when specifying the location of any folder into which you save sensitive data, e.g. census returns, imported and exported CTFs, etc.

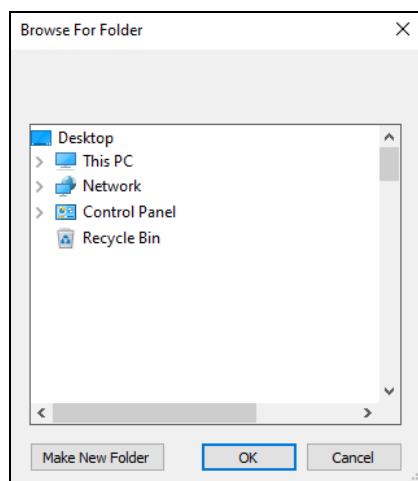
You should be mindful of your school's responsibilities with respect to information security. Consider which users have access to the chosen folder, especially if the folder is shared on a server. Please refer to the government website for more information about securing your information (<https://www.gov.uk/service-manual/technology/securing-your-information>). If you are in any doubt, you should consult with your IT Security Officer before proceeding.

The General Data Protection Regulation (GDPR), which replaces the Data Protection Act 1998, is a directive for certain safeguards regarding the use of personal data. It is important that schools process all data (not just the data collected for the school census) in accordance with the full requirements of the GDPR.

Further information on the GDPR can be found on the Guide to the General Data protection Regulations (GDPR) page of the Information Commissioners Office (ICO) website (<https://ico.org.uk/for-organisations/guide-to-the-general-data-protection-regulation-gdpr>).

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

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



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

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

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

## Specifying the Security Message for Reports

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

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

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

## Editing Census Details

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

- Census Date: 21/05/2020
- Attendance data collected from 01/01/2021 to 04/04/2021
- Exclusions data collected from 01/08/2020 to 04/04/2021

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

- FSM (Free School Meal) data collected from 22/01/2021 to 20/05/2021
- Learner Support data collected from 01/08/2020 to 20/05/2021.

<b>1 Census Details</b>			
Census Date	20/05/2021		
Description	School Census Summer 2021		
Attendance collected from	01/01/2021	Attendance collected to	04/04/2021
Exclusions collected from	01/08/2020	Exclusions collected to	04/04/2021
FSM collected from	22/01/2021	FSM collected to	20/05/2021
Learner Support collected from	01/08/2020	Learner Support collected to	20/05/2021

By default, the return **Description** is displayed as **School Census Summer 2021**.

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

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

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

## Calculating All Details

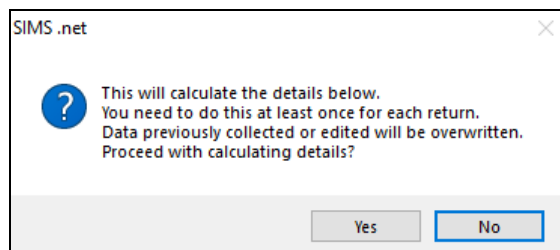
Clicking the **Calculate All Details** button extracts the required information from SIMS and displays the results in the applicable panels of the **Census Return Details** page.

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

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



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



2. Click the **Yes** button to calculate all details.  
At this point, depending on the number of students in the school, there might be a short delay while details are calculated.  
The applicable panels on the **Census Return Details** page are then populated with data.
3. The return can be saved at any point by clicking the **Save** button.

## Editing School Information

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

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

2 School Information			
School Name	Green Abbey School		
LA	823	Establishment Number	4321
Telephone	851234	URN	
School E-mail Address	office@ga.org.uk		
School Phase	SS	Secondary	
School Type	Comprehensive all through 11-18		
Governance	Community	Intake Type	Comprehensive
Lowest NC Year	7	Highest NC Year	13
<a href="#">School Detail</a>			

### 03 | Producing the School Census Summer Return

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

The screenshot shows a 'School Detail' dialog box for 'Green Abbey School'. The dialog has a title bar with 'SIMS School Detail' and standard window controls. Below the title bar is a menu bar with 'Save' and 'Undo'. A breadcrumb trail shows '1 Establishment', '2 Address', '3 Contact Details', '4 Sites', '5 Documents', and '6 Childcare'. The main area is titled '1 Establishment' and contains the following fields:

- School Name: Green Abbey School
- LA: 823 Central Bedfordshire
- Establishment Number: 4321
- Unique Reference Number: 137247
- UK Provider Reference Number: (empty)
- School Phase: Secondary
- School Type: Comprehensive all-through 11-18
- School Governance: Community
- Intake Type: Comprehensive
- Previous School Name: (empty)
- Previous Estab Number: (empty)
- Previous URN Number: (empty)
- Boarding Pupils:  Nursery Class  (empty)
- Head Teacher: Mr Adrian Blacker
- Curriculum Years: 7 and 13
- Pupil Genders: Coeducational
- Gender on entry to school: Coeducational
- Date Name Changed: (empty)
- Earliest DOA: (empty)
- Date Number Changed: (empty)
- Special Class or Unit:
- Main Contact: Mr Adrian Blacker

At the bottom right, there are 'OK' and 'Cancel' buttons. A school crest is displayed on the right side of the dialog.

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

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

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

## Information for Academies

2 School Information							
School Name	Green Abbey School		Previous Name	Previous Name School	Date Changed	31/07/2017	
LA	823	Establishment Number	4321	Previous Estab Number	1234	Earliest DOA	17/07/2017
Telephone	851234	URN		Previous URN		Date Changed	
School E-mail Address	office@ga.org.uk						
School Phase	S5 Secondary						
School Type	Academies						
Governance	Academies		Intake Type	Comprehensive			
Lowest NC Year	7	Highest NC Year	13				
School Detail							

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

- The **School Type** and **School Governance**.  
 Select **Academies** from the applicable drop-down lists.
- The **Previous Name** and **Date Name Changed**.
- The **Previous Estab Number** and **Earliest DOA** (date of admission).  
 This information is used by School Census. If the establishment number (DfE number) has changed for sponsor-led Academies, historical information is not collected, and the earliest date of admission is reported in the School Census.
- The **Previous URN Number** (used by other census returns) and **Date Number Changed**.  
 This information is used by the School Workforce Census. For all types of Academies opened in the collection period, the date that the establishment's URN changed is used to determine when the academy was formed. Historical information is not collected from before the date the URN changed.

## Editing Students with Top-Up Funding

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

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

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

3 Top-up Funding						
Surname	Preferred Surname	Forename	YTI	Reg	SEN	Eve
Abdess	Abdess	Graham	13	G	E	No
Ackton	Ackton	Stephen	10	10E	E	No
Andrews	Andrews	Jasmine	12	M	E	No
Chappling	Chappling	Martin	10	10D	E	No
Hudson	Hudson	Sarah	8	8D	E	No
Lawton	Lawton	Thomas	13	N	E	No
Muganisanwa	Muganisanwa	Sylvia	12	G	E	No

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

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

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

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

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

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

Term: Summer 2021 Students On-Roll on Census Day

Surname: we Forename: YTI: 8 Reg: All

Preferred Surname: SEN: <Any> Ever in care at this school: <Any> Search

Surname	Preferred Surname	Forename	YTI	Reg	SEN	Ever in Care
Webster	Webster	Mark	8	8E		No
Weddle	Weddle	Kameron	8	8D		No

Top-up Funding Add Remove

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

Term: Summer 2021 Students On-Roll on Census Day

Surname: Forename: YTI: All Reg: All

Preferred Surname: SEN: <Any> Ever in care at this school: <Any> Search

Surname	Preferred Surname	Forename	YTI	Reg	SEN	Ever in Care
Abbess	Abbess	Graham	13	G	E	No
Ackton	Ackton	Stephen	10	10E	E	No
Andrews	Andrews	Jasmine	12	M	E	No
Chappling	Chappling	Martin	10	10D	E	No
Hudson	Hudson	Sarah	8	8D	E	No
Lawton	Lawton	Thomas	13	N	E	No
Mugarisanwa	Mugarisanwa	Sylvia	12	G	E	No
Webster	Webster	Mark	8	8E		No
Weddle	Weddle	Kameron	8	8D		No
White	White	Aurora	8	8D		No
Whiting	Whiting	Courtney	8	8C		No

Top-up Funding Add Remove

- To remove a student from the **Top-up Funding** list, highlight the required student, then click the **Remove** button. The student's record is moved to the **Students On-Roll on Census Day** list, from where it can be reselected, if required.

### 03 | Producing the School Census Summer Return

5. Click the **Update** button to save the data and arrange the list of students in **Surname** order.
6. Click the **OK** button located at the bottom right-hand side of the screen to return to the **Census Return Details** page, where the updated information is displayed in the **Top-up Funding** panel.



#### Additional Resources:

*Preparing for the School Census Summer 2021 Return* handbook

## Editing Student Post Looked After Arrangements

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

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

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

Surname	Preferred Surname	Forename	YTI	Reg	Ever in C.	Post Looked After Arrangements
Jump	Jump	Frederick	10	10B	Yes	Ceased to be looked after through a Child Arrangement Order (CAO)
O'Connor	O'Connor	Marc	9	9A	Yes	Ceased to be looked after through Adoption
Simons	Simons	Christian	8	8C	Yes	Ceased to be looked after through a Residence Order (RO)
Stevens	Stevens	Holly	8	8E	Yes	Ceased to be looked after through Adoption

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

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

**Update Students Post Looked After Arrangements**

Update

Term: Summer 2021 Students On-Roll on Census Day

Surname: Forename: YTI: All

Preferred Surname: Reg: All Ever in Care at this school: <Any> Search

Post Looked After Arrangements Add Remove

Surname	Preferred Surname	Forename	YTI	Reg	Ever in Care	Post Looked After Arrangements	Evidence Obtained
Jump	Jump	Frederick	10	10B	Yes	Ceased to be looked after through a Child Arrangement Order (CAO)	<input checked="" type="checkbox"/>
O'Connor	O'Connor	Marc	9	9A	Yes	Ceased to be looked after through Adoption	<input checked="" type="checkbox"/>
Simons	Simons	Christian	8	8C	Yes	Ceased to be looked after through a Residence Order (RO)	<input checked="" type="checkbox"/>
Smith	Smith	Alex	11	11E	No	Ceased to be looked after through a Residence Order (RO)	<input type="checkbox"/>
Smith	Smith	Amy	11	11D	No	Ceased to be looked after through Adoption	<input type="checkbox"/>
Smith	Smith	Aria	8	8B	No	Ceased to be looked after through Adoption	<input type="checkbox"/>
Stevens	Stevens	Holly	8	8E	Yes	Ceased to be looked after through Adoption	<input checked="" type="checkbox"/>

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

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

Term: Summer 2021 Students On-Roll on Census Day

Surname: smi Forename: YTI: All

Preferred Surname: Reg: All Ever in Care at this school: <Any> Search

Post Looked After Arrangements Add Remove

Surname	Preferred Surname	Forename	YTI	Reg	Ever in Care
Smiles	Smiles	George	9	9D	No
Smith	Smith	Christian	11	11C	No
Smith	Smith	Daniel	12	L	No
Smith	Smith	Jade	12	K	No
Smith	Smith	Laura	11	11B	No
Smith	Smith	Osias	12	J	No
Smith	Smith	Stephanie	12	H	No
Smith	Smith	Tabitha	9	9E	No
Smith	Smith	Trinity	12	G	No
Smith	Smith	Tristan	12	G	No

### 03 | Producing the School Census Summer Return

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

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

Surname	Preferred Surname	Forename	YTI	Reg	Ever in Care	Post Looked After Arrangements	Evidence Obtained
Jump	Jump	Frederick	10	10B	Yes	Ceased to be looked after through a Child Arrangement Order (CAO)	<input checked="" type="checkbox"/>
O'Connor	O'Connor	Marc	9	9A	Yes	Ceased to be looked after through Adoption	<input checked="" type="checkbox"/>
Simons	Simons	Christian	8	8C	Yes	Ceased to be looked after through a Residence Order (RO)	<input checked="" type="checkbox"/>
Smith	Smith	Alex	11	11E	No	Ceased to be looked after through a Residence Order (RO)	<input type="checkbox"/>
Smith	Smith	Amy	11	11D	No	Ceased to be looked after through Adoption	<input type="checkbox"/>
Smith	Smith	Aria	8	8B	No	Ceased to be looked after through Adoption	<input type="checkbox"/>
Stevens	Stevens	Holly	8	8E	Yes	Ceased to be looked after through Adoption	<input checked="" type="checkbox"/>

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

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

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

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

- Select the **Evidence Obtained** check box if documents have been obtained that provide evidence of the post looked after arrangements.

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

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

- To remove a name from the list, highlight it then click the **Remove** button. The record is moved to the **Students On-Roll on Census Day** list, from where it can be reselected, if required.



8. Click the **Update** button to save the information and arrange the list of students in surname order.

If you have indicated that evidence has been obtained, you are reminded to ensure that the necessary documents are stored securely outside of SIMS or within the Document Management Server.

9. Click the **OK** button to continue.
10. Click the **OK** button (located at the bottom right-hand side of the screen) to return to the **Census Return Details** page, where the updated information is displayed in the **Post Looked After Arrangements** panel.



#### Additional Resources:

*Preparing for the School Census Summer 2021 Return* handbook



#### More Information:

*Post Looked After Arrangements Report* on page 32

## Entering Attendance Information

Termly attendance data (including attendance codes and the number of sessions missed) should be provided for non-boarder students and leavers aged four to 15 inclusive on 31/08/2020, who were on-roll for at least one session during the collection period from the 01/01/2021 to 04/04/2021.

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

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

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

- SIMS Attendance/Lesson Monitor is in use, the attendance codes being used are DfE compliant and there are either:
  - no missing marks
  - or
  - missing marks.
- SIMS Attendance/Lesson Monitor is in use and the attendance codes being used are DfE non-compliant.
- SIMS Attendance/Lesson Monitor is not in use.

## SIMS Attendance/Lesson Monitor Users

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

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

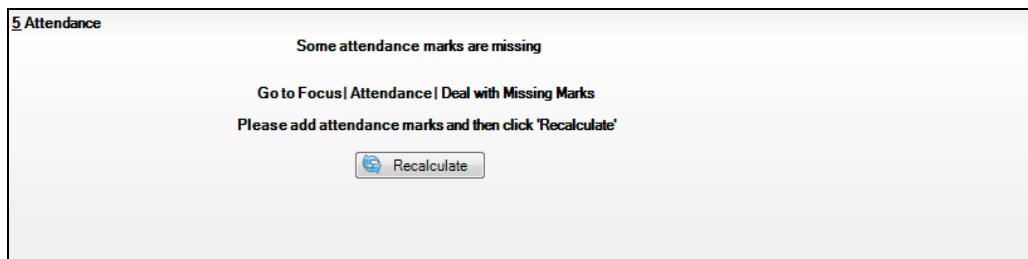
### Are your Attendance Codes DfE Compliant?

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

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



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



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

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

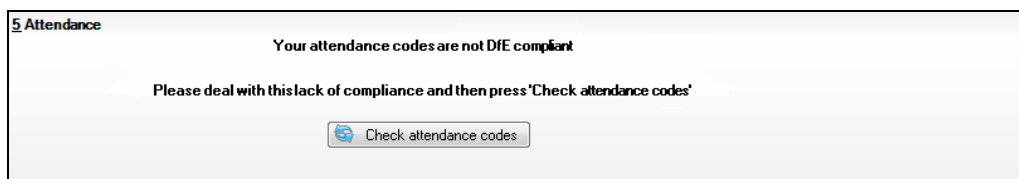


#### More Information:

Producing Detail Reports on page 28

## Are your Attendance Codes DfE Non-Compliant?

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



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

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

3. Click the **OK** button to continue.

## SIMS Attendance/Lesson Monitor Not in Use

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

- Termly Possible Sessions (**T Poss Sessions**)
- Termly Sessions Missed due to Authorised Absence (**T Auth Absences**)
- Termly Sessions Missed due to Unauthorised Absence (**T Unauth Absences**)
- Total sessions attending approved educational activity (**T AEA Sessions**)
- Total sessions unable to attend due to exceptional circumstances (**T Excep Sessions**)
- Total number of sessions unable to attend due to Coronavirus (**T Corona Sessions**).

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

### 03| Producing the School Census Summer Return

1. To filter the display of students in the **Attendance** panel, select **Year Group, Registration Group** or **Enrolment Status** from the **Group By** drop-down list.  
Alternatively, select **Group by None** to display a list of all students.
2. To sort the displayed data by surname, forename, year group, registration group or enrolment status, click the appropriate column header.
3. For each student, enter the correct attendance numbers in the appropriate columns.
4. To clear the attendance information and check for additional students, click the **Check for additional students & zero totals** button.

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

# 04 | Completing the School Census Summer Return

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<b>Producing Detail Reports .....</b>	<b>28</b>
<b>Printing a Report from your Web Browser .....</b>	<b>34</b>
<b>Transferring Report Data to a Spreadsheet.....</b>	<b>34</b>
<b>Deleting Temporary Web Browser Files .....</b>	<b>34</b>
<b>Producing the Summary Report .....</b>	<b>35</b>
<b>Editing an Unauthorised Return .....</b>	<b>35</b>
<b>Authorising the Return .....</b>	<b>36</b>
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## Creating and Validating the School Census Return

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

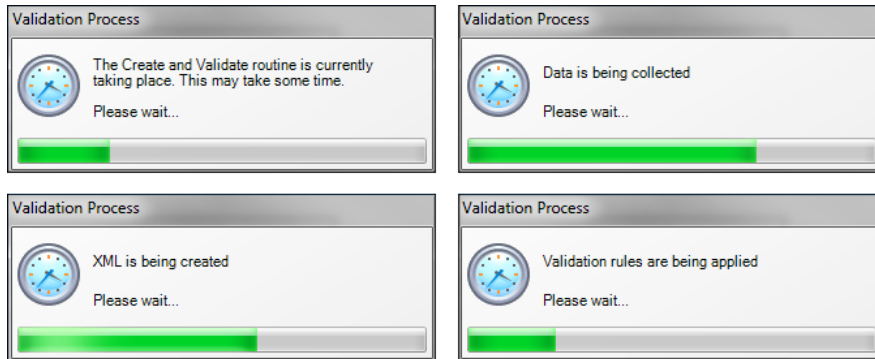
Validating the return creates an unauthorised return file, which is then run against a set of DfE rules. When the validation is complete, a list of errors and queries is displayed.

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

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

## 04| Completing the School Census Summer Return

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



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

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

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



### Additional Resources:

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

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

## Resolving Validation Errors and Checking Queries

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

Type	Sequence	Message	Location	Solution
F	1500	UPN missing	Name: Abraham, Jane  Date of Birth: 2005-05-19, Female UPN:	# Go to Focus   Student   Student Details and add or issue a UPN.
F	1500	UPN missing	Name: Reid, Rosie  Date of Birth: 2009-03-07, Female UPN:	# Go to Focus   Student   Student Details and add or issue a UPN.
F	1840	Pupils aged 5 and over Language missing or invalid.	Name: Henderson, Jacki  Date of Birth: 2010-05-07, Male UPN: K82329914	# Go to Focus   Student   Student Details Ethnic/cultural panel and enter First language
F	2350	Insufficient Address information provided.	Name: Bains, Kirki  Date of Birth: 2005-01-18, Male UPN: H82020109012	# Go to Focus Student Student Details Addresses and edit pupil's address
Q	1601Q	Please Check: Pupil's age is out of range for school type.	Name: Sungal, Skaisel  Date of Birth: 2008-03-28, Female, Age: 12 UPN: B8	# Go to Focus   Student   Student Details and enter pupil's date of birth.
Q	1620Q	Please check: duplicate pupil records with the same Surname, Forename, Gender and Date of birth.	Name: Bennison, Hugo  Date of Birth: 2013-02-03, Male UPN:	# Go to Focus Student Student details and check for duplicate pupil record.
Q	1620Q	Please check: duplicate pupil records with the same Surname, Forename, Gender and Date of birth.	Name: Bennison, Hugo  Date of Birth: 2010-02-03, Male UPN: V8232999140	# Go to Focus Student Student details and check for duplicate pupil record.
Q	2350Q	Please check: Duplicate record with no address details.	Name: Bellis, Colin  Date of Birth: 2013-09-14, Female UPN: C923299914	# Go to Focus Student Student Details Addresses and edit pupil's address

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

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

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

*TIP: Using the Solution hyperlinks*

*When the pointer is hovered over an error or query row, it changes to a hand if a hyperlink is available to the area of SIMS where the problem can be checked.*

*A hyperlink is also indicated by a hash symbol (#) preceding the **Solution** text.*

*Click the required hyperlink to display the specific area in SIMS where the record(s) can be checked/corrected.*

To assist in the viewing of errors and queries:

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

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

The width of the columns can be changed by dragging the dividing line between the column headings until the required size is achieved.

- View a summary of validation failures by clicking the **Report** button (located above the **Validation Errors Summary** panel, on the left-hand side). The report is displayed in your web browser, from where it can be printed or transferred to another application, if required (please see Transferring Report Data to a Spreadsheet on page 34).  
The report is saved automatically in the **Census Folder** (specified previously via the census browser). The original report, which was generated when the **Create & Validate** button was clicked is also stored in this folder.
  - Your generated report file name: Validation Errors Summary.HTML
  - Original report file name:  
<LACode><SchoolNumber>\_<SurveyType>\_<LACode><LL><Year>\_<SerialNumber>\_ValidationErrorsSummary.HTML

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

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

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

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

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



**More Information:**

*Transferring Report Data to a Spreadsheet on page 34*

## Producing Detail Reports

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

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

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



The following reports are currently available.

### On-Roll Basic Details Report

Report Criteria: Students on-roll on census day.

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

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

### Leavers Basic Details Report

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

- Leavers with attendance one term ago (01/01/2021 to 04/04/2021)
- Leavers with exclusions (01/08/2020 to 04/04/2021)
- Leavers with learner support of Vulnerable Group Bursary Awarded or Discretionary Bursary Awarded (01/08/2020 to 20/05/2021).

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

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

### Exclusions Report

Report Criteria: On-roll students and leavers with exclusions and final exclusion reviews:

- Fixed term exclusions, excluding lunchtime exclusions, starting from 01/08/2020 to 04/04/2021
- Permanent exclusions between 01/08/2020 and 04/04/2021.

#### Termly Exclusions (Fixed and Permanent)

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

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

## Attendance Report

Report Criteria: Students with attendance one term ago (01/01/2021 to 04/04/2021). On-roll students and leavers (not boarders) aged four to 15 at 31/08/2020.

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

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

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

## Absentees Report

Report Criteria: On-roll students and leavers (not boarders) who have an absence rate of 10% or above, with attendance one term ago (01/01/2021 to 04/04/2021), who were aged four to 15 at 31/08/2020.

The report does not include data from the second half of the summer term.

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

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

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

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

## SEN Report

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

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

## Address Details Report

Report Criteria: Students on-roll on census day.

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

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

## Free School Meal Eligibility Report

Report Criteria: On-roll students on census day who were eligible for free school meals on or after 22/01/2021 and up to 20/05/2021 (census day).

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

*NOTES: This report includes any free school meals recorded outside of England, e.g. Wales.*

*Only Free School Meals records where the country recorded is England or <blank> attract the Pupil Premium.*

## Learner Support Report

Report Criteria: On-roll students and leavers aged 16 plus at 31/08/2020 who have been awarded Vulnerable Group and/or Discretionary Bursary funding from 01/08/2020 to 20/05/2021.

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

## Top-up Funding Report

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

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

## Post Looked After Arrangements Report

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

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

## Permanent Exclusions without Final Review Report

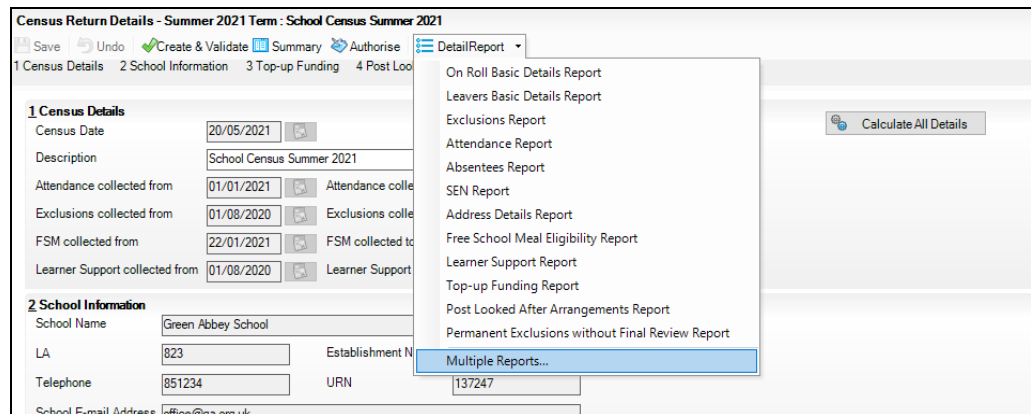
Report Criteria: On-roll students and leavers with permanent exclusions and without a final review from 01/09/2019 to 04/04/2021.

This new report details permanent exclusions that will not be included in the census, either because the exclusion process is still ongoing or because the school has not recorded the final review result. The report has been provided to assist schools in checking whether details have been recorded accurately. The start date for checking the permanent exclusions is deliberately 01/09/2019 so that all instances can be checked.

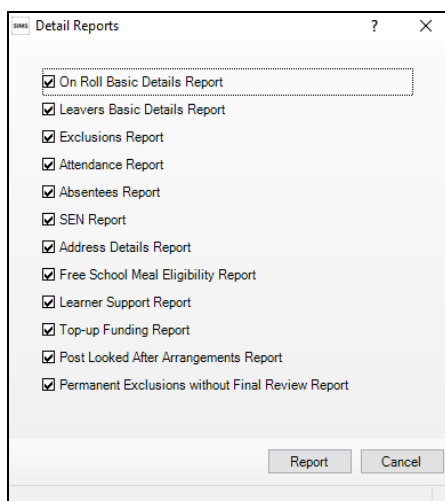
The following information is included in the report: UPN, legal surname, legal forename, date of birth (DOB), gender, date of admission (DOA), date of leaving (DOL), reason for exclusion, exclusion start date, SEN expert requested (Yes/No) and on-roll status.

## Generating Detail Reports

To select a single detail report, select the required report from the **Detail Report** drop-down list located at the top of the **Census Return Details** page. The selected report is generated automatically and displayed in your web browser.



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



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

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

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

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

<LACode><SchoolNumber>\_<SurveyType>\_<LACode><LL><Year>\_<SerialNumber>\_<name of the report>\_detail\_report.html

For example:

8234321\_SC2\_823LL21\_001\_onroll\_pupil\_basic\_details\_report.html.

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

**School Census Summer - 2021 (On Roll Basic Data)**

**Security Message :** This report contains sensitive information.

**Report Criteria:** Students on roll on Census day (20/05/2021)  
**Total Students:** 986

School Name: Green Abbey School      Fileset Number: 1800 (SIMS.net)  
 Filename: 8234321\_SC2\_823LL21\_001 UNA      Report Created: 18/02/2021  
 XML Version: Validation: 2021-1.0 - Updated: 2020-08-19 ErrorList: 2021-1.0 - Updated: 2020-08-19 Summary: 2021-1.0 - Updated: 2020-08-19

UPN	ULN	Legal Surname	Legal Forename	Preferred Surname	Former Surname	DOB	Gender	YTI	DOA	Enrolment Status	Language	YSSA	Part-time Status	Boarder
Y2020010003	514233553	Aaron	Chris	Aaron	-	01/09/2005	Male	10	01/09/2017	Single Registration	English	Un sought	No	Not a Boarder
C823432117001	5142311344	Aaron	Jason	Aaron	-	05/03/2008	Male	10	01/09/2017	Single Registration	English	Un sought	No	Not a Boarder
J820200100032	5142335561	Aaron	Liz	Aaron	-	01/09/2005	Female	10	01/09/2017	Single Registration	English	Un sought	No	Not a Boarder
M820200100034	5142335553	Aaron	Sophie	Aaron	-	01/09/2005	Female	10	01/09/2017	Single Registration	English	Un sought	No	Not a Boarder
N823432113104	1111178638	Abbess	Graham	Abbess	-	29/06/2002	Male	13	03/09/2014	Single Registration	English	Obtained	No	Not a Boarder
C823432113106	1111178611	Abbey	Sean	Abbey	-	18/09/2002	Male	13	03/09/2014	Single Registration	English	Obtained	No	Not a Boarder
N823286910001	-	Abdulah	Timmer	Abdulah	-	12/01/2009	Male	7	07/09/2020	Single Registration	English	Un sought	No	Not a Boarder
R823432110004	5142331655	Abimbola	Dason	Abimbola	-	14/05/2008	Male	8	02/09/2019	Single Registration	Defaulted	Obtained	No	Not a Boarder
J82020010003	5142335545	Adcock	Stephen	Adcock	-	12/03/2008	Male	10	01/09/2017	Single Registration	English	Un sought	No	Not a Boarder
M82020010006	5142338830	Aissa	Aissa	Aissa	-	15/05/2004	Male	12	03/09/2018	Single Registration	English	Obtained	No	Not a Boarder

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



**More Information:**

Configuring the Census Folder on page 10

Transferring Report Data to a Spreadsheet on page 34

## Printing a Report from your Web Browser

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

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

## Transferring Report Data to a Spreadsheet

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

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

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

## Deleting Temporary Web Browser Files

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

This prevents the information, e.g. copies of web pages that are stored in the local cache for faster viewing, remaining on the hard disk of the PC in the temporary directory, where they are not secure because they can still be accessed.

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

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

## Producing the Summary Report

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

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

### Generating the Summary Report

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

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

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

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

<LACode><SchoolNumber>\_<SurveyType>\_<LACode><LL><Year>\_<SerialNumber>\_<name of the report>\_Summary\_Report.html.

For example: 8234321\_SC2\_823LL21\_001\_Summary\_Report.html.

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



#### More Information:

*Configuring the Census Folder on page 10*

*Generating Detail Reports on page 32*

*Transferring Report Data to a Spreadsheet on page 34*

*Authorising the Return on page 36*

*Deleting an Unauthorised Return on page 40*

## Editing an Unauthorised Return

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

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

## 04 | Completing the School Census Summer Return

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



### More Information:

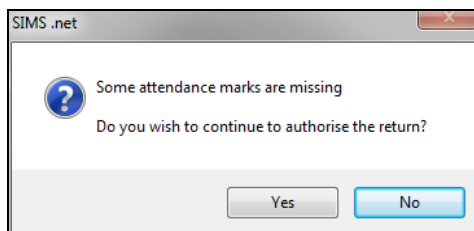
- Configuring the Census Folder on page 10*
- Specifying the Security Message for Reports on page 11*
- Resolving Validation Errors and Checking Queries on page 26*
- Producing Detail Reports on page 28*
- Producing the Summary Report on page 35*

## Authorising the Return

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

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

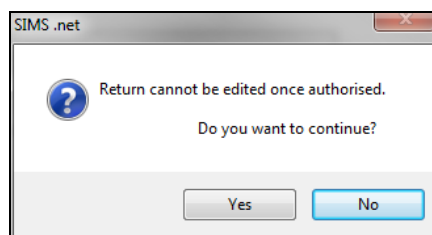
1. Click the **Authorise** button. If missing marks exist, the following message is displayed.



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

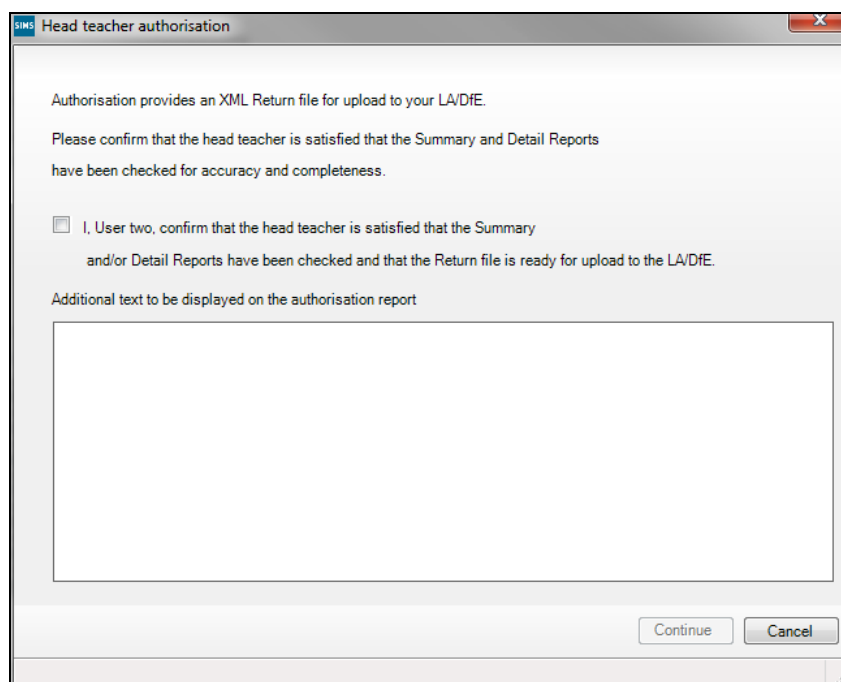


If you choose to continue, a message reminds you that the return cannot be edited once it is authorised.



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

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



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

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

## 04 | Completing the School Census Summer Return

All reports (including detail reports) and the XML file, are saved in the **Census Folder**, which was specified previously in the **Census Return for Summer 2021 Term** browser.

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

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

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

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



### Additional Resources:

*Designing and Running Reports handbook*



### More Information:

*Producing the Summary Report on page 35*

*Retrieving Authorised Census Return Files on page 39*

*Copying a Return on page 40*

## Submitting the Return

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

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

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

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



### More Information:

*Configuring the Census Folder on page 10*

*Copying a Return on page 40*

## Retrieving Authorised Census Return Files

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

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

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

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

- b. Click the **OK** button to select or create the folder then return to the **Retrieve Authorised Return Files for <census name>** page where the chosen folder name is displayed in the **Download to** field.
4. Highlight the return you wish to retrieve then click the **Retrieve Files** button.

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

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

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

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

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



### Additional Resources:

*Designing and Running Reports* handbook

## Copying a Return

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

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

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

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

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

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

4. Click the **Yes** button to make the copy, which is then displayed in the browser as:  
Copy of <description of selected file>.
5. To rename the copied return, highlight it, then click the **Open** button to display the **Census Return Details** page.
6. In the **Census Details** panel, edit the **Description** and then click the **Save** button.

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

## Deleting an Unauthorised Return

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

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

**IMPORTANT NOTES:** Any return files that have already been authorised cannot be deleted.

When a return file is deleted, any associated files, e.g. Validation Errors Summary, detail reports, etc. that have been produced are also deleted.

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

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



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