

# SIMS End of Year Procedures and Promotion to the Academic Year 2025/2026

**Nursery/Primary/Special**



June 2025



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## SIMS Year End – Checklist

Tasks to be completed during the current academic year (2024/2025)			
Task	Page	Complete?	Notes
Create the 2025/2026 academic year	P.3		
Check/change next year's pastoral structure	P.12		
Allocate teachers to next year's Registration Groups	P.15		
Enter date of leaving, reason for leaving and destination for pupils leaving in July	P.16		
Create CTFs for leavers and upload via S2S	P.19		
Complete promotion mapping	P.20		
Create Admission Group(s)	P.26		
Enter Applicants and change their status to Accepted (as appropriate)	P.29		
Allocate Applicants to Registration Groups	P.35		
Dinner Money routines (if applicable)	P.38		
Staff leavers	P.41		
Create SIMS accounts for new staff as appropriate	P.42		

Tasks to be completed after the start of the new academic year (2025/2026)			
Task	Page	Complete?	Notes
Admit new pupils into the school	P.43		
Withdraw pupils from Admission Groups (as appropriate)	P.44		
Re-admit leavers who are returning to the school (if applicable)	P.44		
Attendance routines	P.45		
Essential routines for part time Nursery pupils and pupils going from part time to full time	P.46		
Housekeeping routines	P.47		

## Introduction

This booklet covers the range of tasks in SIMS that need to be completed in order to move from the current academic year to the next. Most of the processes in this booklet need to be carried out during the current academic year unless indicated otherwise.

It is recommended that you read these instructions through before starting the Year End process and contact the **School Business Services MIS Service desk** if there is anything you don't understand.

A checklist is also included at the front of this booklet, for you to tick off tasks as they are completed.

It is advisable to have the following information available before creating the new academic year:

### Dates

- 2025/2026 Term Dates
- INSET dates
- Occasional days, (if applicable)
- Bank holidays

### Reg Groups

- Are the names of Registration Groups changing? If so, what will they be called?
- Are pupils moving up in existing Registration Groups or are pupils being mixed up?
- Who are the teachers for each Registration Group in September?

### Pupil Information

- Leavers
  - Date of leaving
  - Destination schools
- New pupils
  - Date of admission
  - Which Registration Groups are they joining?

### Staff Information

- Leavers
  - Date of leaving
  - Destination after leaving
- New staff
  - Date of birth
  - Employment start dates
  - SIMS Account required?

## PART 1: To be completed during the current academic year

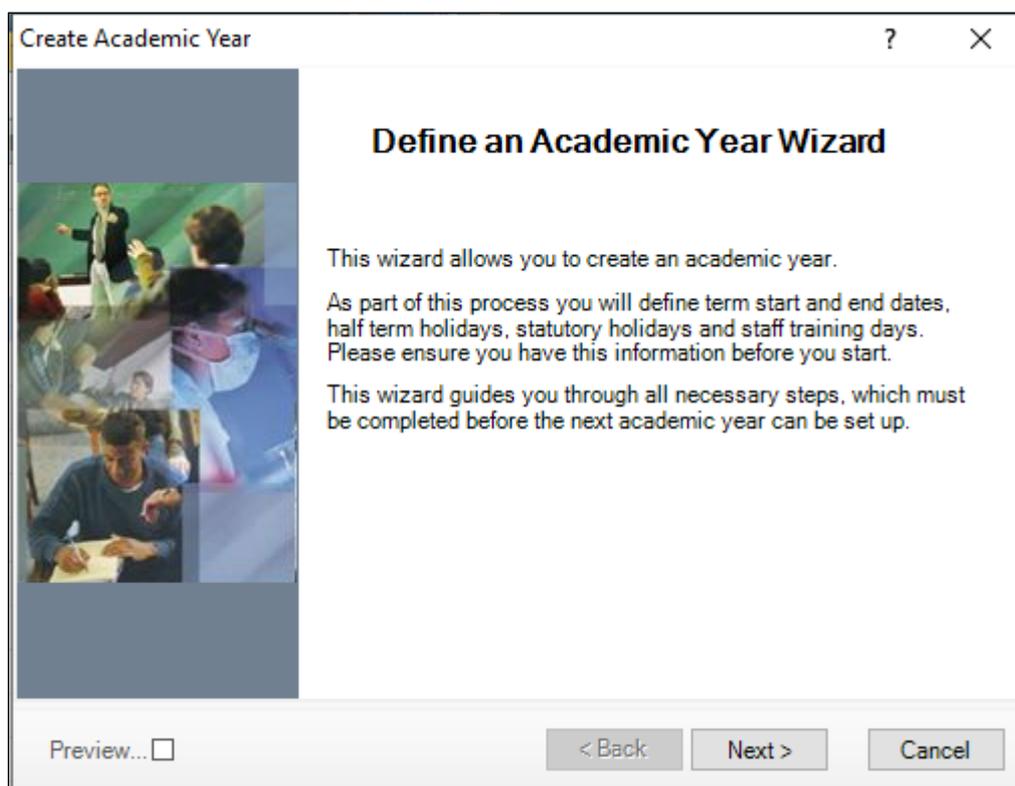
### Creating the 2025/2026 Academic Year

This process defines the start and end dates for the school terms, half-terms, staff training days and public holidays.

The process for creating a new Academic Year is very demanding on the SIMS Server – please proceed when (ideally) you have sole use of SIMS or when there are very few users in the system.

**Important Note:** It is recommended but **not** compulsory to contact your IT technical support to check when your SIMS data was last backed up before beginning the process..

- From the menu, select **Routines | School | Academic Year** to display the **Define an Academic Year wizard**



- Click **Next** and the following will be displayed

**Create Academic Year** [?] [X]

**Define the school working week**

Specify the school working week by selecting which days or half days the school is open.

First day of the school week:

Day of the week	AM Session	PM Session
Monday	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Tuesday	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Wednesday	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Thursday	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Friday	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Saturday	<input type="checkbox"/>	<input type="checkbox"/>
Sunday	<input type="checkbox"/>	<input type="checkbox"/>

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

Preview...

- Check that the AM and PM Monday to Friday sessions are ticked and click **Next**

SIMS [X]

 Are you sure the AM/PM sessions selected are correct? Sessions cannot be changed later as this would affect Attendance marks and Cover arrangements.

- Click **Yes**

Now enter the term dates for your school.

Create Academic Year
? X

**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	01/09/2025	19/12/2025	Christmas Holiday
Spring Term	05/01/2026	27/03/2026	Easter Holiday
▶ Summer Term	13/04/2026	20/07/2026	Summer Holiday

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

Add Term...
Remove

Preview...

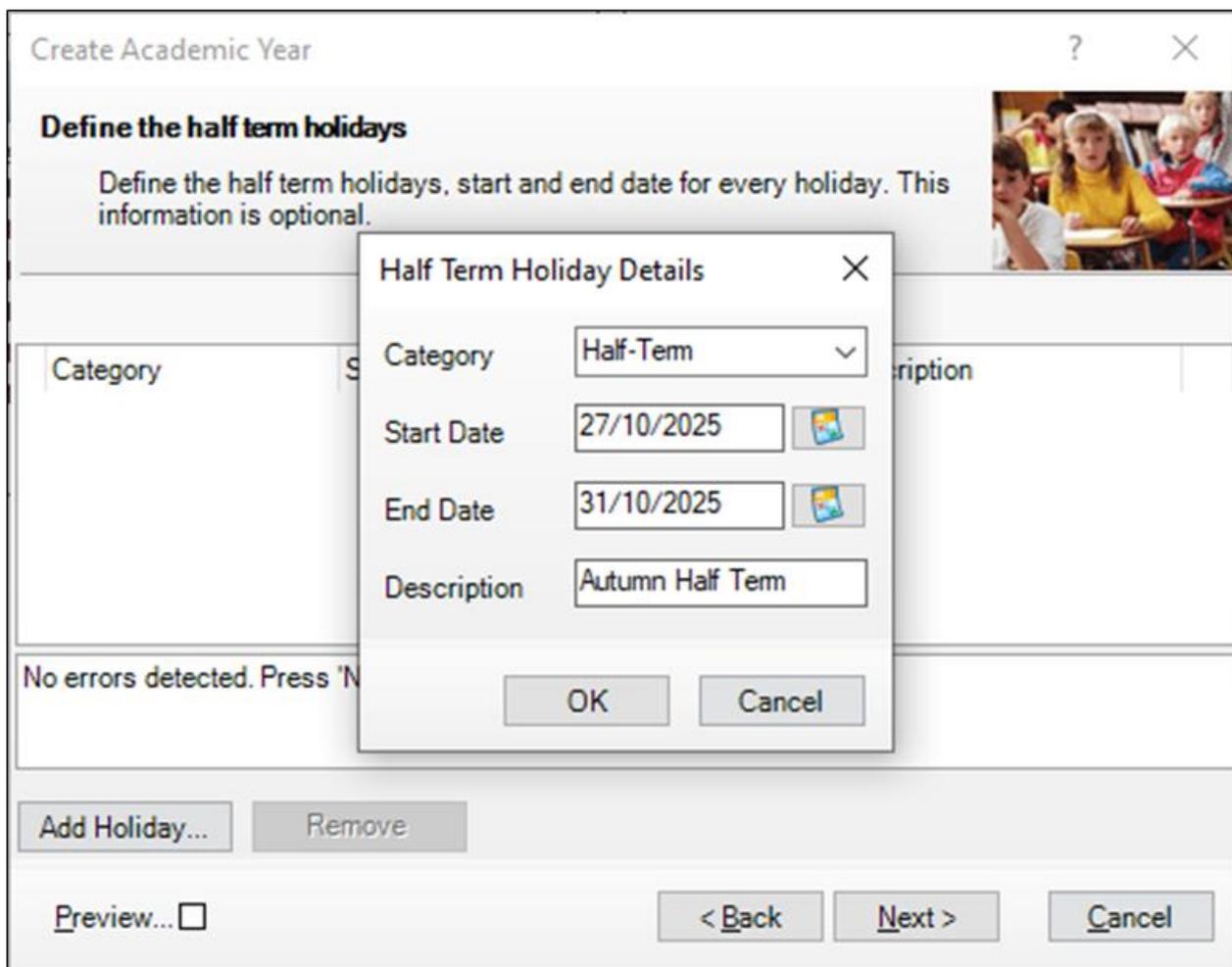
< Back
Next >
Cancel

**Note:** The start dates should include any staff training days.

The dates can be typed in or selected from the calendar by clicking on the drop-down arrow.

- When you have added the start and end dates for all the terms, click on the white space below to activate the **Next** button. Click **Next**

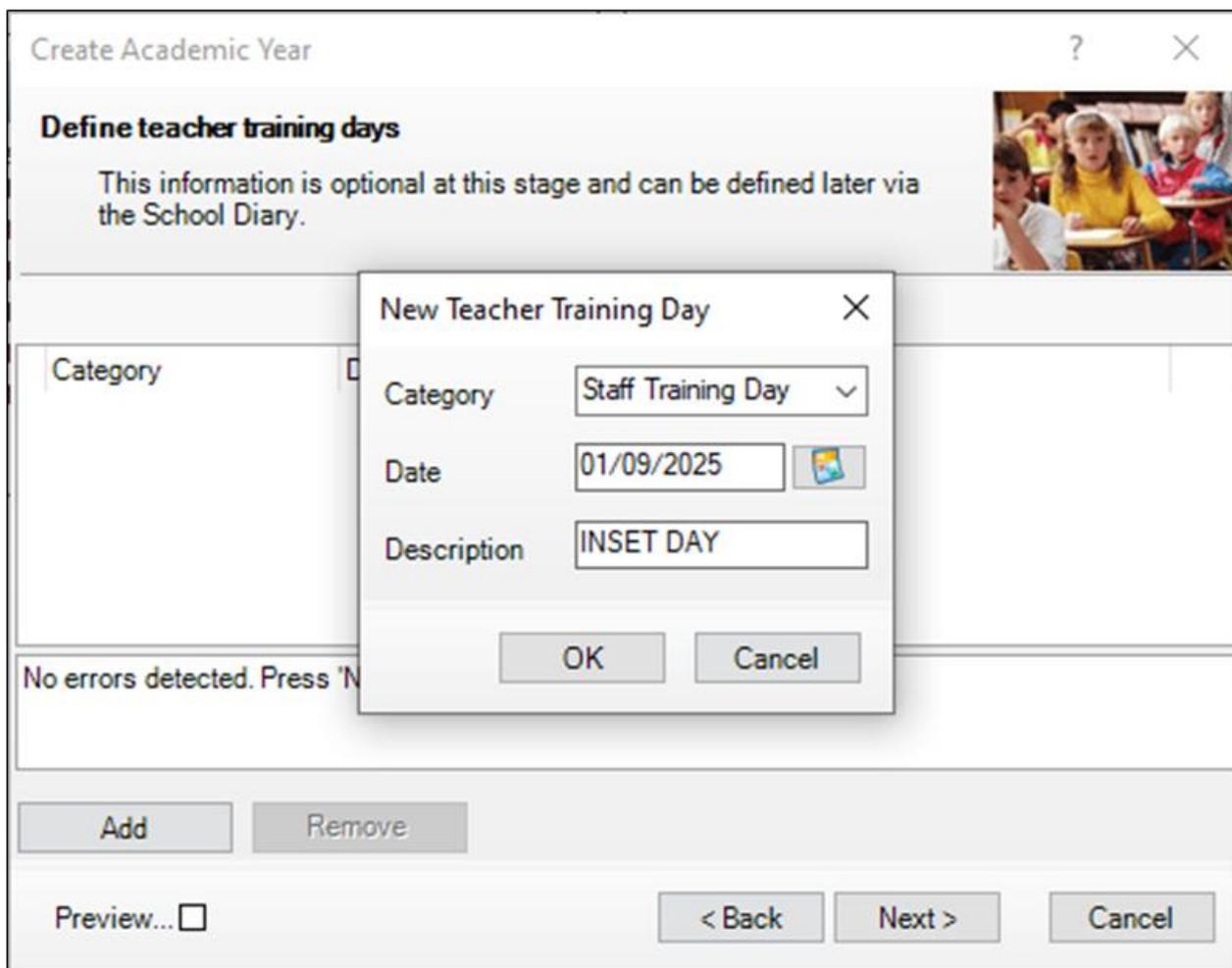
- On the **Define Half Term Holidays** screen, click the **Add Holiday** button and enter the details of the Autumn half term holiday



**Note:** Description is optional.

- Click **OK** and repeat this process for the Spring and Summer half term holidays
- Once the correct dates have been entered for all three half terms, click **Next**

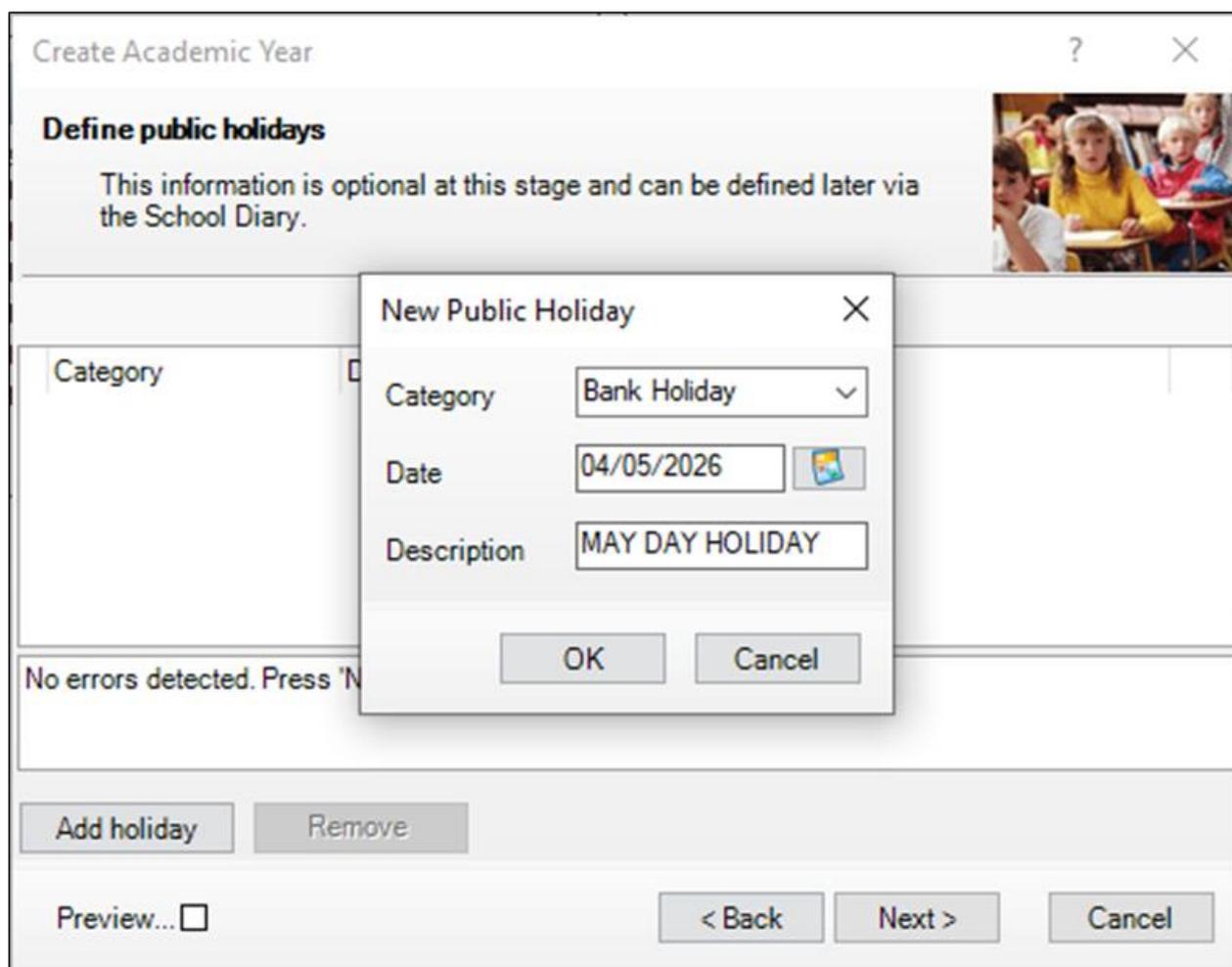
- On the Define Teacher Training Days screen, click the **Add** button to enter the details of staff training days



- Click **OK** and repeat the process for any further staff training days that you have planned and click **Next**

**Note:** Further staff training days can be added at a later date if they have not all yet been agreed.

- Now add the May Bank Holiday



**Create Academic Year**

**Define public holidays**

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

**New Public Holiday**

Category: Bank Holiday

Date: 04/05/2026

Description: MAY DAY HOLIDAY

OK Cancel

Category

No errors detected. Press 'N'...

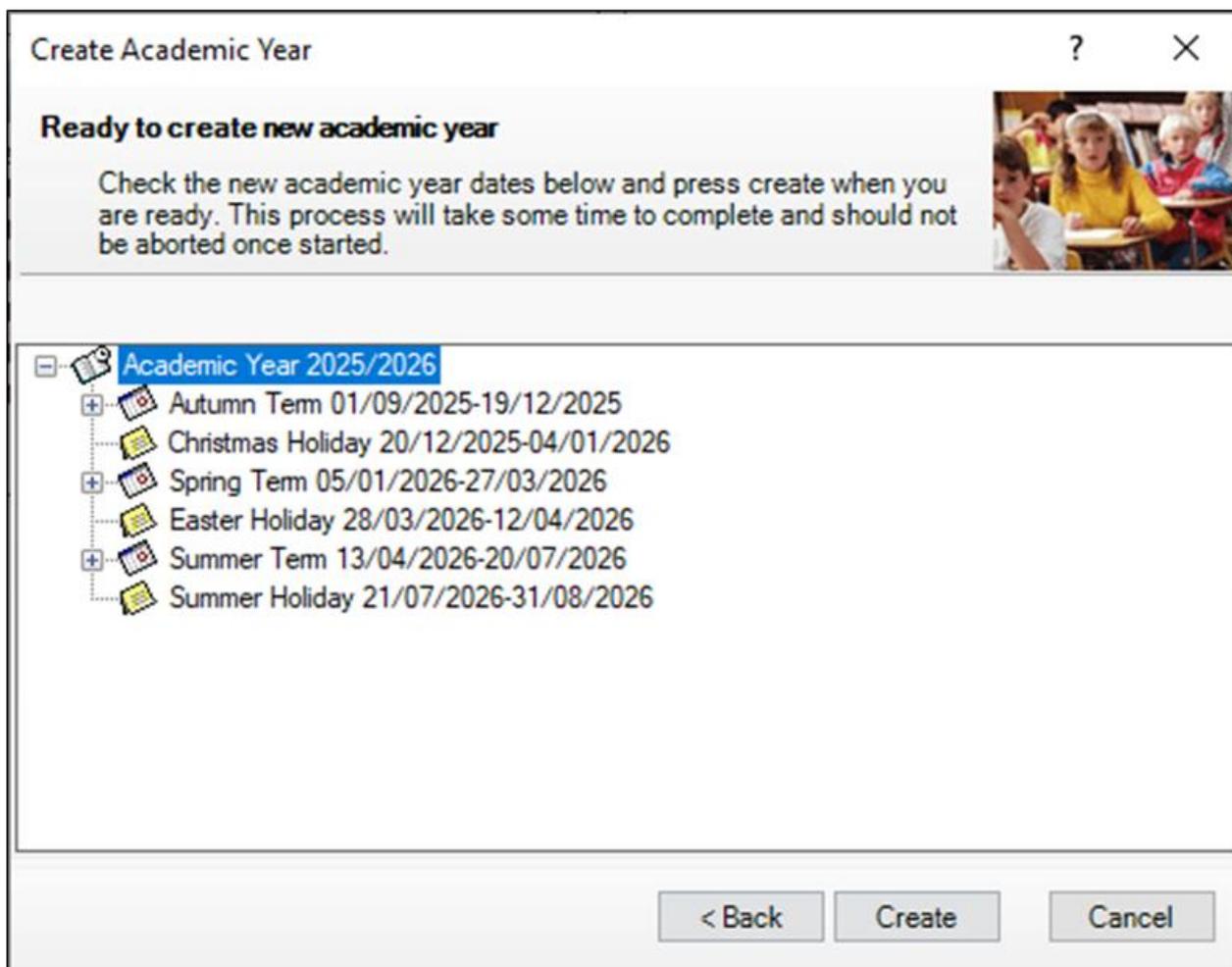
Add holiday Remove

Preview...

< Back Next > Cancel

**Note:** Occasional Days can also be added here if applicable, by selecting the Category of Occasional Day.

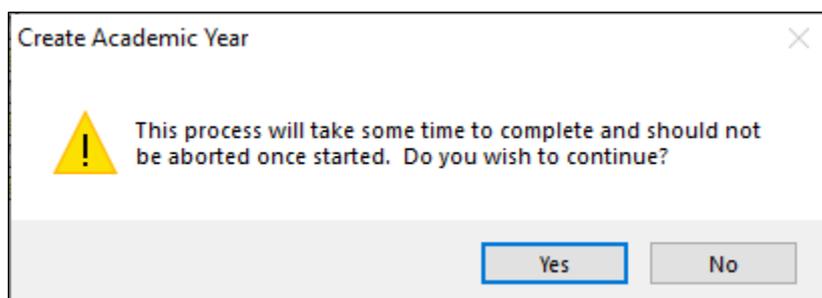
- Click **OK** and **Next**



Check that all the dates displayed are correct.

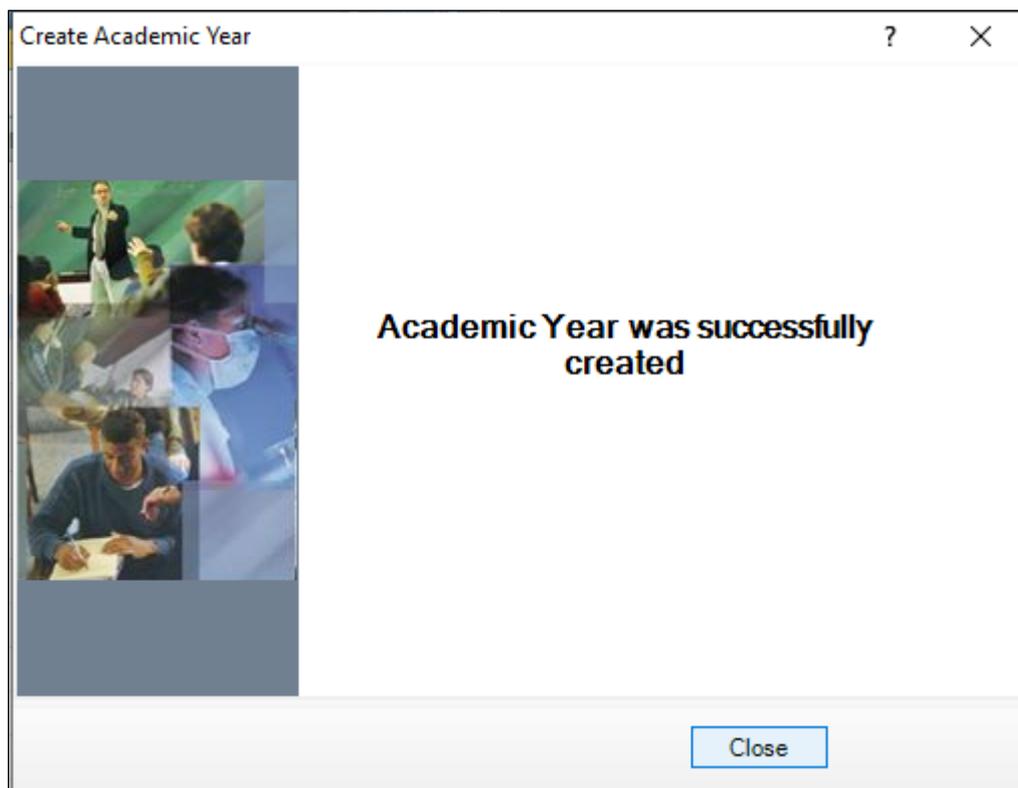
- Click **Create**

The following message will be displayed.



- Click **Yes** to continue

When the process is finished you will see the window below.

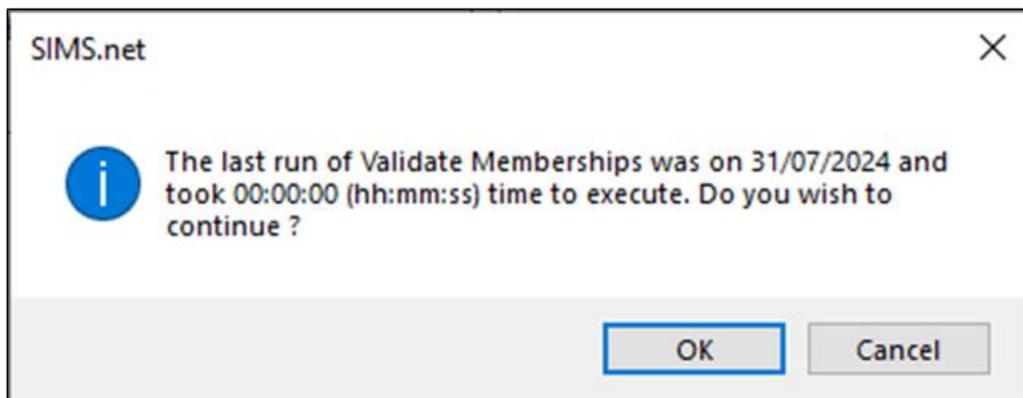


- Click **Close**

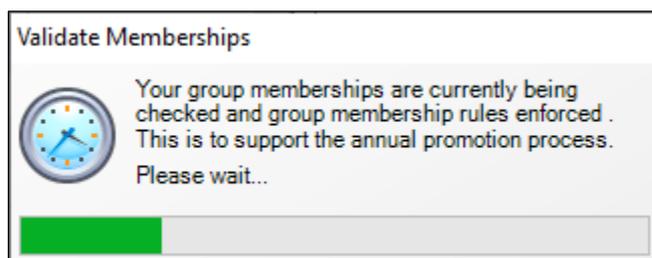
## Validate Group Memberships

After creating an academic year, it is recommended that you validate group memberships.

- Select **Tools | Validate Memberships**
- You will receive this message, click **OK** to proceed



The process will run as follows.



## Next Year's Pastoral Structure

The pastoral structure for the new academic year is automatically set up when the new academic year is created and is based on the current academic year's structure. You may need to amend this if your school will be organised differently in the new academic year. For example, you may need to:

- Add or delete a Year Group e.g., opening / closing your Nursery
- Change Year Groups from a horizontal to a vertical structure to enable pupils from mixed Year Groups to be taught together in the same Registration Group
- Change Year Groups from a vertical to a horizontal structure so pupils in a Registration Group are all from the same Year Group
- Add additional Registration Groups where pupil numbers have increased
- Merge Registration Groups where pupil numbers have decreased
- Change Registration Group names

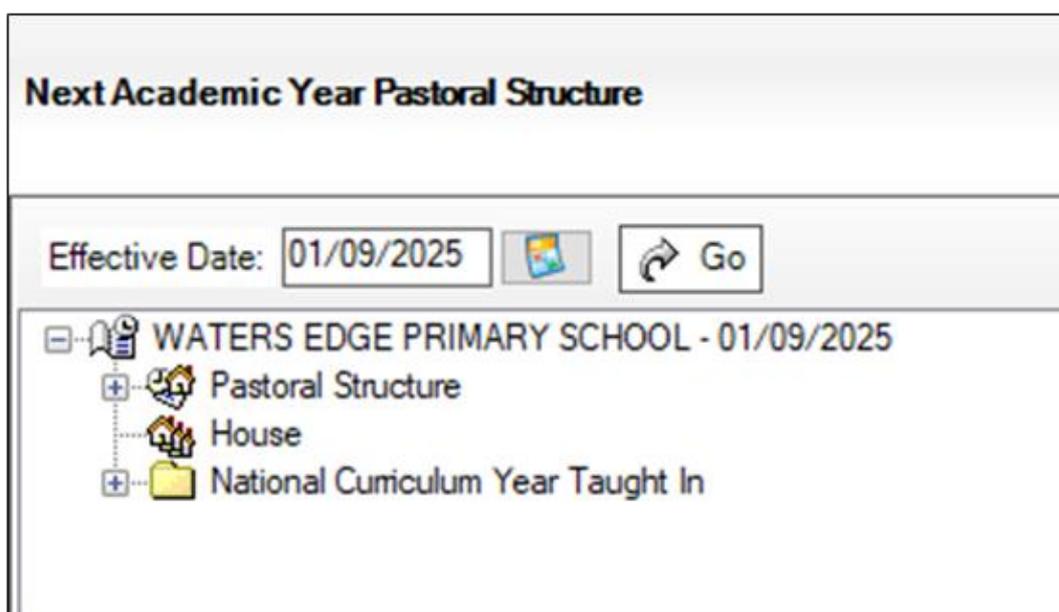
Please contact the **School Business Services MIS Service desk** for further advice if you need to change the structure of your school.

### Adding / Removing Registration Groups

To increase or decrease the number of Registration Groups in a particular year and/or change the names of Registration Groups attached to years, see below.

- Select **Focus | School | Pastoral Structure | Next Academic Year Structure**

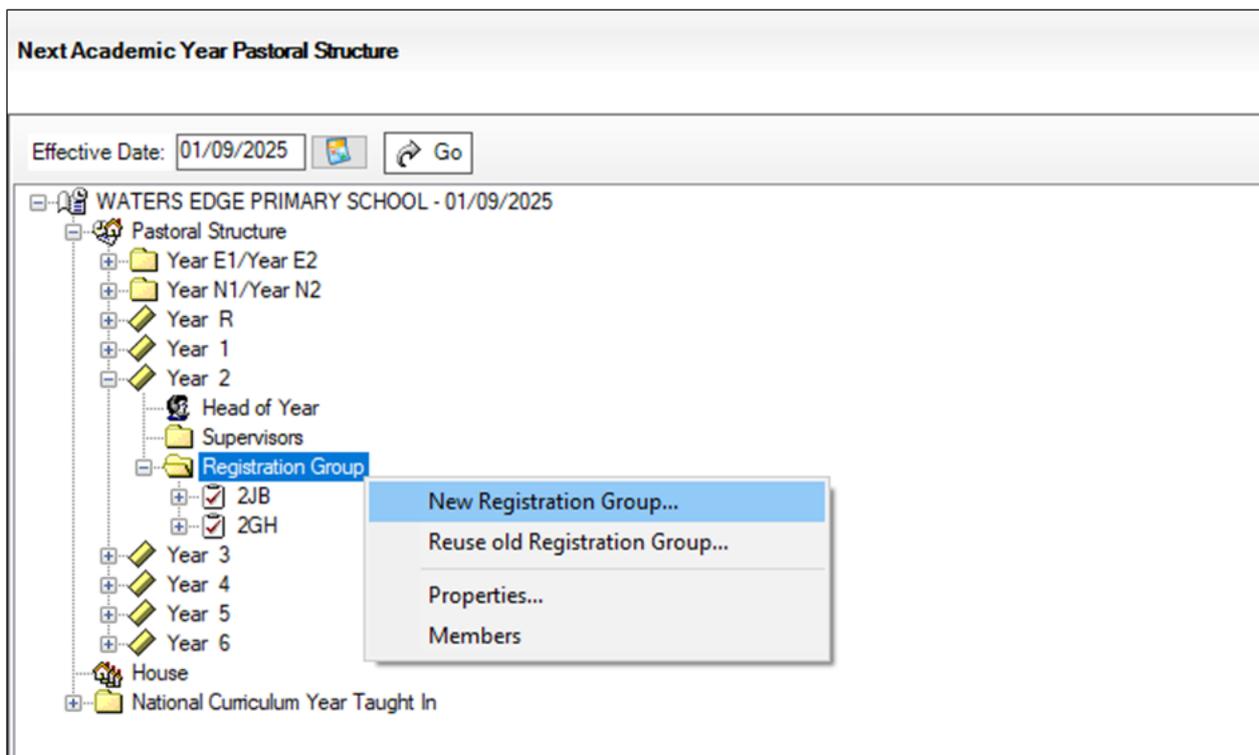
**Note:** Check the display in the title bar to ensure that you are working in the **Next Academic Year Pastoral Structure**.



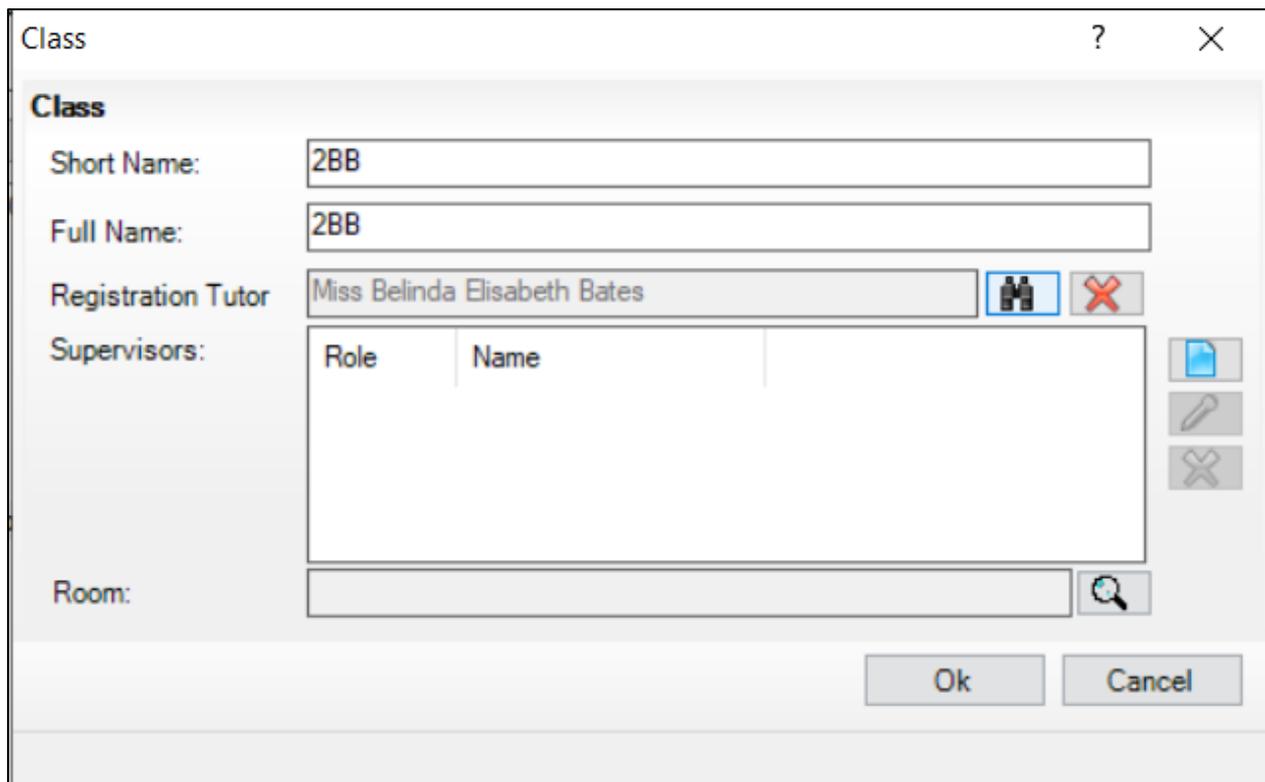
- Expand the Pastoral Structure tree by clicking the + signs until you get to the Registration Group level

**IMPORTANT NOTE:** *If the name of a Registration Group has changed, do not attempt to rename the Registration Group. A new group needs to be created first with the new name then the old group needs be removed.*

- To **add** a new Registration Group, right click on the Registration Group folder and select **New Registration Group**



The following window will appear:



**Class**

Short Name: 2BB

Full Name: 2BB

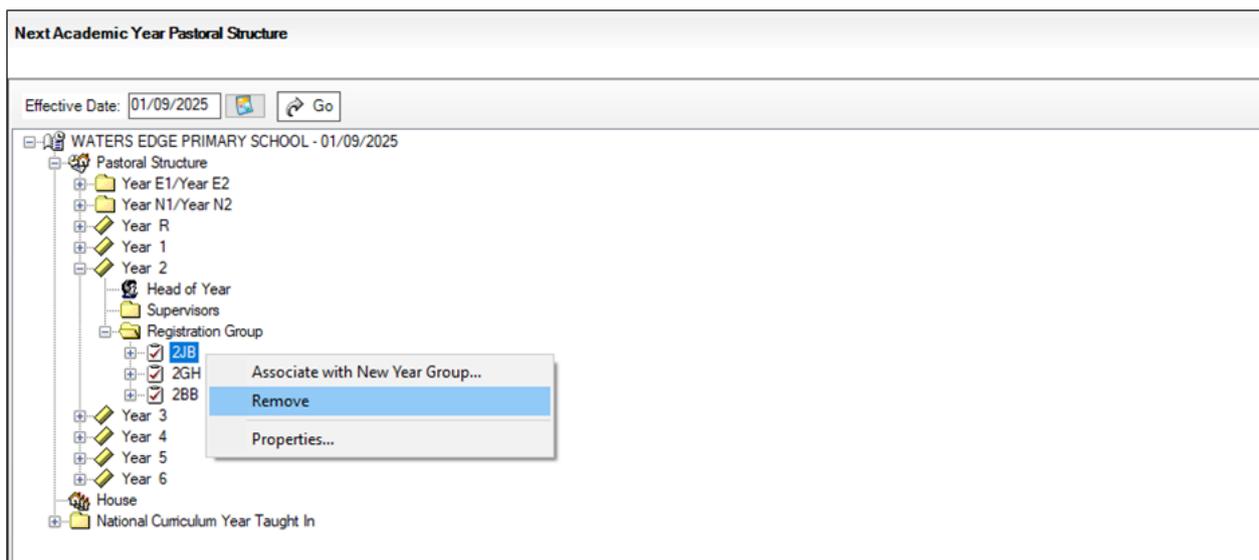
Registration Tutor: Miss Belinda Elisabeth Bates

Role	Name

Room: [ ]

Ok Cancel

- Type in the **Short Name** and **Full Name** for the group
- You can also select the Registration Tutor if this information is known at this stage by clicking the browser button next to the appropriate field
- To **remove** a Registration Group, right click on the Registration Group that you wish to remove and select **Remove**



Next Academic Year Pastoral Structure

Effective Date: 01/09/2025

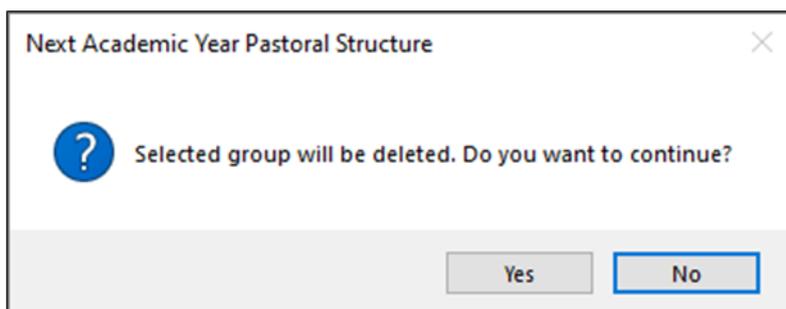
WATERS EDGE PRIMARY SCHOOL - 01/09/2025

- Pastoral Structure
  - Year E1/Year E2
  - Year N1/Year N2
  - Year R
  - Year 1
  - Year 2
    - Head of Year
    - Supervisors
    - Registration Group
      - 2JB
      - 2GH
      - 2BB
    - Year 3
    - Year 4
    - Year 5
    - Year 6
  - House
  - National Curriculum Year Taught In

Context menu for 2BB:

- Associate with New Year Group...
- Remove**
- Properties...

The following message will be displayed



- Click **Yes** and you will see the new group added to your structure and the old one removed

### Allocating Registration Tutors to Registration Groups

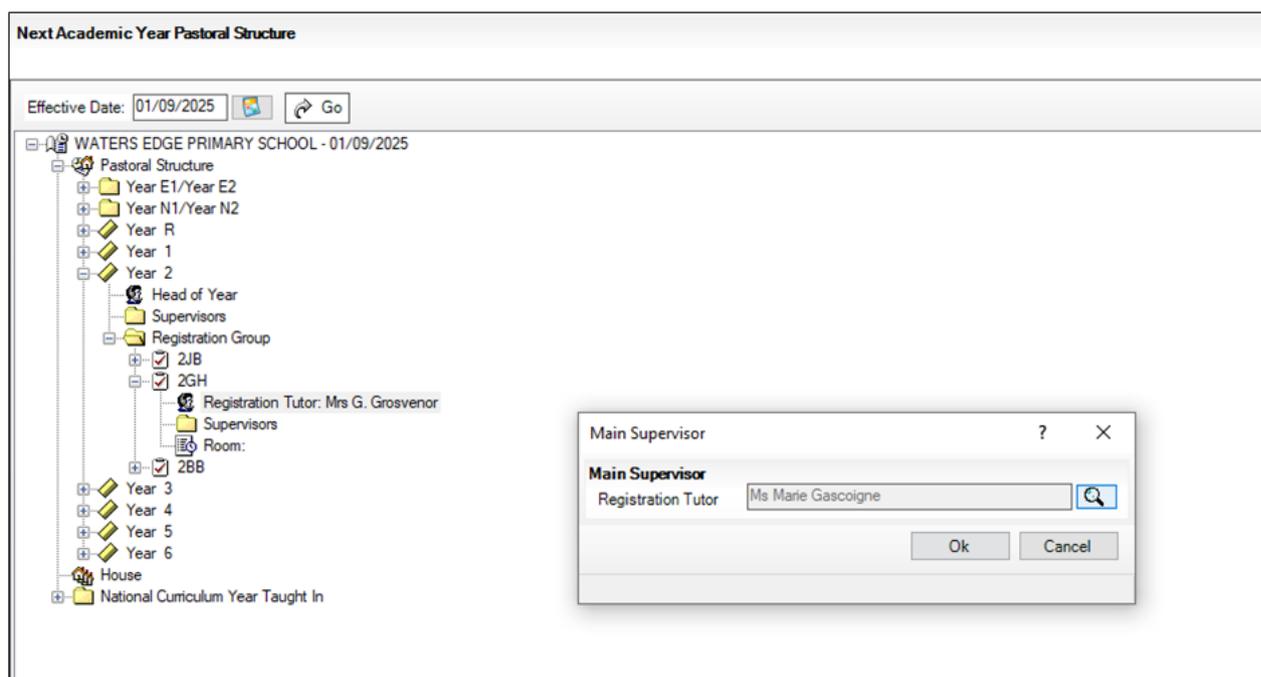
**Important note for Attendance Registers:** it is **essential** that the correct teacher is assigned to each Registration Group via next year's pastoral structure, in order for the teacher to see their class register.

If teachers have been assigned to different Registration Groups in the new academic year, then you will need to make changes to next year's pastoral structure.

**Note:** New staff will need their name, date of birth, sex and employment start date entered in SIMS Personnel before they can be allocated to Registration Groups.

To allocate teachers to Registration Groups:

- Select **Focus | School | Pastoral Structure | Next Academic Year Structure**
- Expand the pastoral structure tree by clicking the + signs until you get to the Registration Tutor level and right click
- To change the teacher currently assigned to the group, click **Properties**. The new Registration Group tutor may be selected by clicking the browser button and searching for the correct member of staff



Repeat the process for any other Registration Groups to which you wish to allocate tutors.

### Saving changes to the Pastoral Structure

Once all required changes have been made to the Pastoral Structure, click the **Save** button on the toolbar. This may take some time depending on the number of changes that have been made.

## Pupil Leavers

You will need to enter a leaving date and reason for leaving for those pupils who are leaving the school at the end of this academic year. The pupils will not be taken off roll until the date of leaving has passed.

You can either record the leaving information individually via a pupil's record through **Focus | Pupil | Pupil Details**.

- On the **School History** panel, enter the
  - **Date of Leaving**
  - **Reason for Leaving**
  - **Destination After Leaving**
  - **Destination Expected Start Date**
  - **Grounds for Removal**

**Note: Destination Institution** is optional, unless your LA requests that you send weekly CMJ/CML xml files as per the Children Missing in Education Statutory DfE guidance.

You need to add the details of Destination Schools via **Tools | Other Schools** to be able to enter the **Destination Institution**.

**11 School History**

Date of Leaving:  Reason for Leaving:

Destination After Leaving:

Destination Institution:

Destination Expected Start Date:  CMJ file sent or not required  CML file sent or not required

Grounds for Removal:

Alternatively, you can use the Bulk Leavers Routine for a group of pupils leaving with similar information e.g., all Year 6 pupils leaving on the same day because they are going to Secondary School.

### Bulk Leavers Routine

- Select **Routines | Pupil | Leavers** to display the Find Pupil(s) screen
- Select the appropriate Year Group, and then click **Search**

In the example below we have searched for all pupils in Year 6.

- If you wish to select all of the pupils you have searched for, click on the small arrow next to the **Select** and choose **All**

**Find Pupil(s)**

Search  Print  Browse  Select

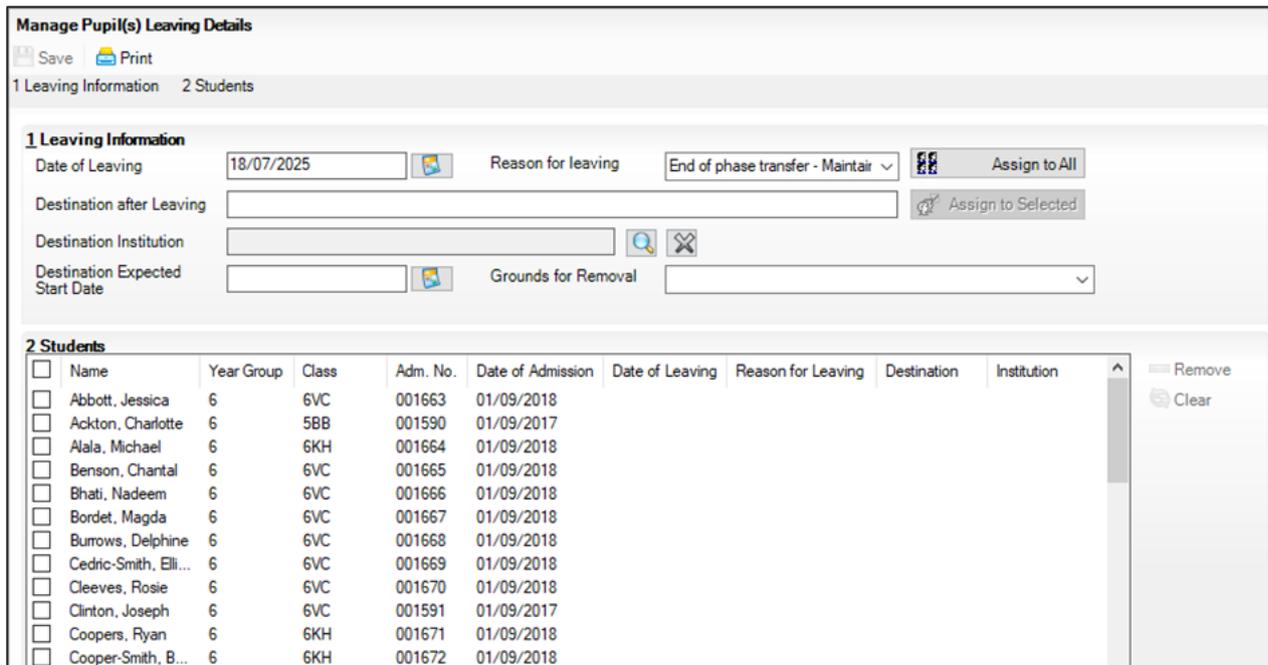
Surname  Forename  Status

Year Group  Class  Effective Date

Name	Year Group	Class	Adm. No.	Date of Admission	Date of Leaving	Reason for Leaving	Destination	Expected Start	G
Abbott, Jessica	6	6VC	001663	01/09/2018					
Ackton, Charlotte	6	5BB	001590	01/09/2017					
Alala, Michael	6	6KH	001664	01/09/2018					
Benson, Chantal	6	6VC	001665	01/09/2018					
Bhati, Nadeem	6	6VC	001666	01/09/2018					

**Note:** If you wish to select only some of those searched for, highlight the pupils and click **Selected**. Multiple pupils can be highlighted by holding down the **Ctrl** Key whilst clicking on each pupil. Blocks of pupils can be highlighted by holding down the **Shift** key and clicking on the first and last pupil in the block.

- The selected pupils will now populate the **Manage Pupil(s) Leaving Details** screen. If all the selected pupils are leaving on the same date for the same reason, enter the **Date of Leaving** and **Reason for leaving** and click on the **Assign to All** button



Name	Year Group	Class	Adm. No.	Date of Admission	Date of Leaving	Reason for Leaving	Destination	Institution
<input type="checkbox"/> Abbott, Jessica	6	6VC	001663	01/09/2018				
<input type="checkbox"/> Ackton, Charlotte	6	5BB	001590	01/09/2017				
<input type="checkbox"/> Alala, Michael	6	6KH	001664	01/09/2018				
<input type="checkbox"/> Benson, Chantal	6	6VC	001665	01/09/2018				
<input type="checkbox"/> Bhati, Nadeem	6	6VC	001666	01/09/2018				
<input type="checkbox"/> Bordet, Magda	6	6VC	001667	01/09/2018				
<input type="checkbox"/> Burrows, Delphine	6	6VC	001668	01/09/2018				
<input type="checkbox"/> Cedric-Smith, Elli...	6	6VC	001669	01/09/2018				
<input type="checkbox"/> Cleeves, Rosie	6	6VC	001670	01/09/2018				
<input type="checkbox"/> Clinton, Joseph	6	6VC	001591	01/09/2017				
<input type="checkbox"/> Coopers, Ryan	6	6KH	001671	01/09/2018				
<input type="checkbox"/> Cooper-Smith, B...	6	6KH	001672	01/09/2018				

- Next type in the name of a Secondary School that pupils will be joining in **Destination after Leaving** panel
- Then highlight groups of pupils on the list to whom you wish to apply the same destination secondary school to, by holding down the **Ctrl** key and clicking on each pupil. Leave the **Date of Leaving** and **Reason for Leaving** completed earlier
- Then click on the **Assign to Selected** button, the information will appear next to each pupil. You can then highlight the next group of pupils, change the Secondary School name in the **Destination after Leaving** panel and assign the school information to them

**Manage Pupil(s) Leaving Details**

Save Print

1 Leaving Information 2 Students

**1 Leaving Information**

Date of Leaving: 18/07/2025 Reason for leaving: End of phase transfer - Maintair Assign to All

Destination after Leaving: Kensington Aldridge Academy Assign to Selected

Destination Institution: Kensington Aldridge Academy

Destination Expected Start Date: 01/09/2025 Grounds for Removal: A:Registered at another school

**2 Students**

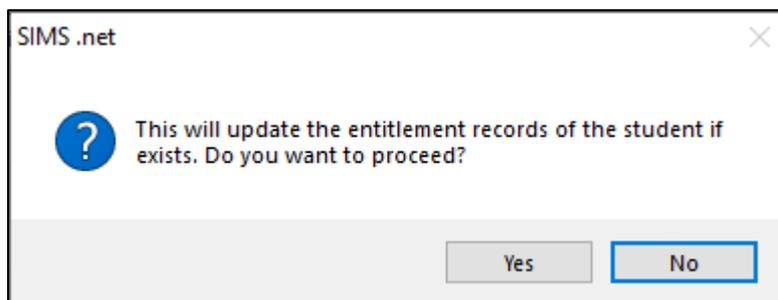
<input type="checkbox"/>	Name	Year Group	Class	Adm. No.	Date of Admission	Date of Leaving	Reason for Leaving	Destination	Institution	
<input checked="" type="checkbox"/>	Abbott, Jessica	6	6VC	001663	01/09/2018					
<input checked="" type="checkbox"/>	Ackton, Charlotte	6	5BB	001590	01/09/2017					
<input type="checkbox"/>	Alala, Michael	6	6KH	001664	01/09/2018					
<input checked="" type="checkbox"/>	Benson, Chantal	6	6VC	001665	01/09/2018					
<input type="checkbox"/>	Bhati, Nadeem	6	6VC	001666	01/09/2018					
<input checked="" type="checkbox"/>	Bordet, Magda	6	6VC	001667	01/09/2018					
<input type="checkbox"/>	Burrows, Delphine	6	6VC	001668	01/09/2018					
<input type="checkbox"/>	Cedric-Smith, Eli...	6	6VC	001669	01/09/2018					
<input checked="" type="checkbox"/>	Cleaves, Rosie	6	6VC	001670	01/09/2018					
<input type="checkbox"/>	Clinton, Joseph	6	6VC	001591	01/09/2017					
<input type="checkbox"/>	Coopers, Ryan	6	6KH	001671	01/09/2018					
<input checked="" type="checkbox"/>	Cooper-Smith, B...	6	6KH	001672	01/09/2018					

Remove Clear

**Note:** If you do not know the Destination at this stage, it may be left blank and completed later. If the **Date of leaving** and **Reason for leaving** are complete, the pupil will be considered a Leaver.

- Once you have completed all known information, click **Save**

The following message will appear:



- Click **Yes**

The pupils **will not** become Leavers on the system until their date of leaving has passed.

## CTFs

Primary Schools should send a Common Transfer File (CTF), to each destination school containing all pupils who are transferring to that school.

## Moving pupils into the correct Year Groups and Registration Groups

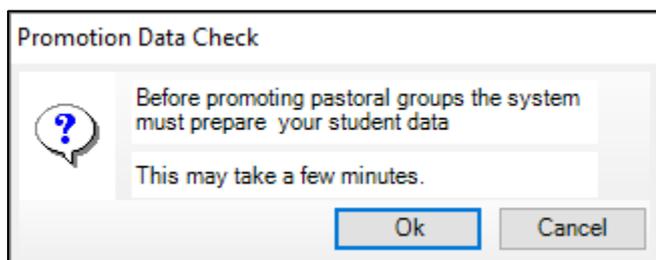
You will need to move pupils from their current Year and Registration Groups into their new groups from September. This is referred to as **Promotion**.

### Promotion

Before you can do this make sure that you have:

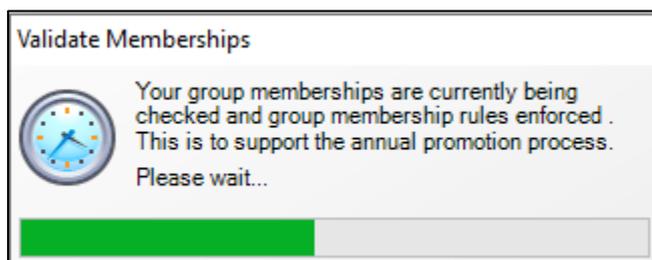
- Created the 2025/2026 Academic Year
- Amended your pastoral structure as required, such as adding new classes
- Added date of leaving and reason for leaving for any Leavers, via **Routines | Pupil | Leavers**
- Select **Routines | School | Promotion**

The following window will appear.



- Click **OK**

The Validate Memberships message will then appear.



The following window will appear:

- Make sure that the **Promote from** box shows the current **Academic Year 2024/2025** then click the **Load** button to populate the screen

Setup Promotion Mapping from Academic Year 2024/2025

**Academic Year:**  
 Promote from: Academic Year 2024/2025 [Load]

**Year Group**

Year Group	Promotion Path
Year E1	Year E2
Year E2	Year N1
Year N1	N2
N2	R
R	1

Override membership  [Set Default]

**Class**

Year	Registration Group	Promotion Path	Registration Tutor	Promote Registration Tutor	Pron Super
Year E1/Year E2	TUMBLBOOS			<input type="checkbox"/>	
Year N1/Year N2	NURS PM		Ms Lisa Lawson	<input type="checkbox"/>	
Year N1/Year N2	NURS AM		Mrs Rebecca Lorrin	<input type="checkbox"/>	
Year R	REC ELM	1 OAK	Mr Richard Perrin	<input type="checkbox"/>	
Year R	REC PINE	1 ASH	Mr Oliver Joyner	<input type="checkbox"/>	

Override membership  [Finish]

Check that the **Year Group** promotion paths are correct.

For example, the promotion path for Year N2 will usually be to Year R as shown in the illustration. If a path is incorrect, it can be changed using the drop-down arrow to the right.

The **Class** promotion paths will need to be checked/selected individually using the drop-down arrow in the **Promotion Path** column. In the example above pupils in REC PINE will be moving to 1 OAK next year. Pupils in REC ELM will be moving to 1 ASH and so on.

The promotion path can be left blank for any Registration Group if required, and the pupils dealt with on an individual basis.

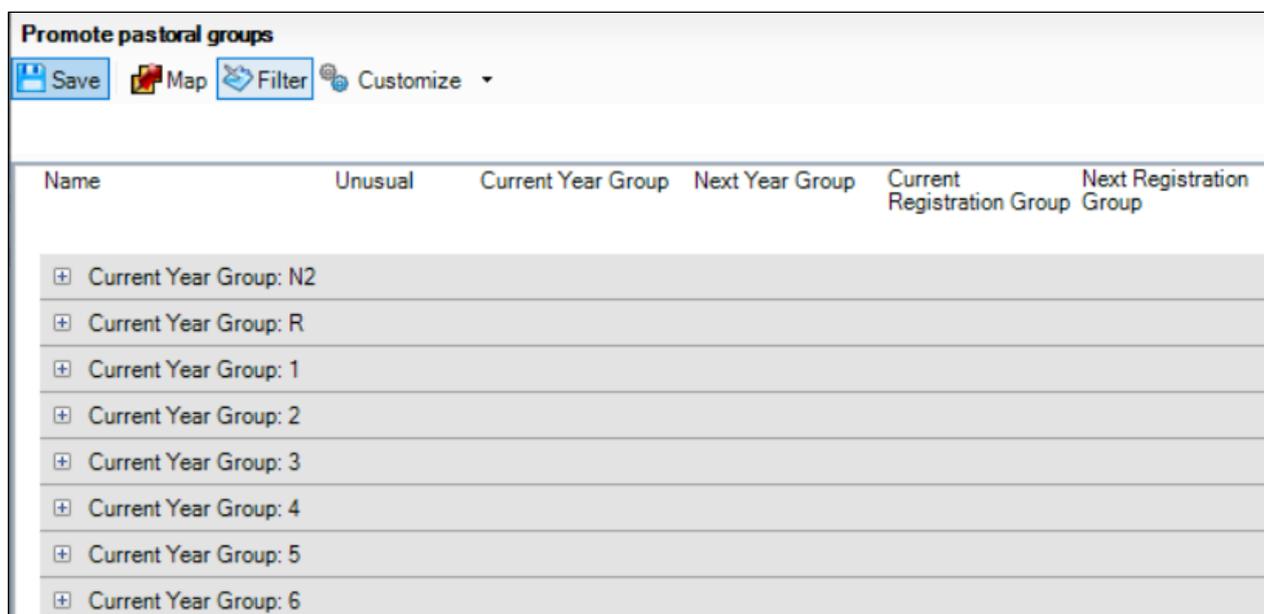
You may want to do this if not all pupils that are in a current Registration Group are moving up together into the same group.

If most pupils in a group are moving up together, you may set the promotion path for the majority and then edit the exceptions individually.

If the Registration Tutor is moving up with the pupils, you can put a tick in the **Promote Registration Tutor** box.

**The first time you run this process** select both Override **membership** boxes. However, on subsequent occasions these boxes would not normally be selected as you will overwrite any changes to next year's Registration Groups that you have made for individual pupils.

Once you have entered the required information, click **Finish** to save your changes and the following will be displayed.



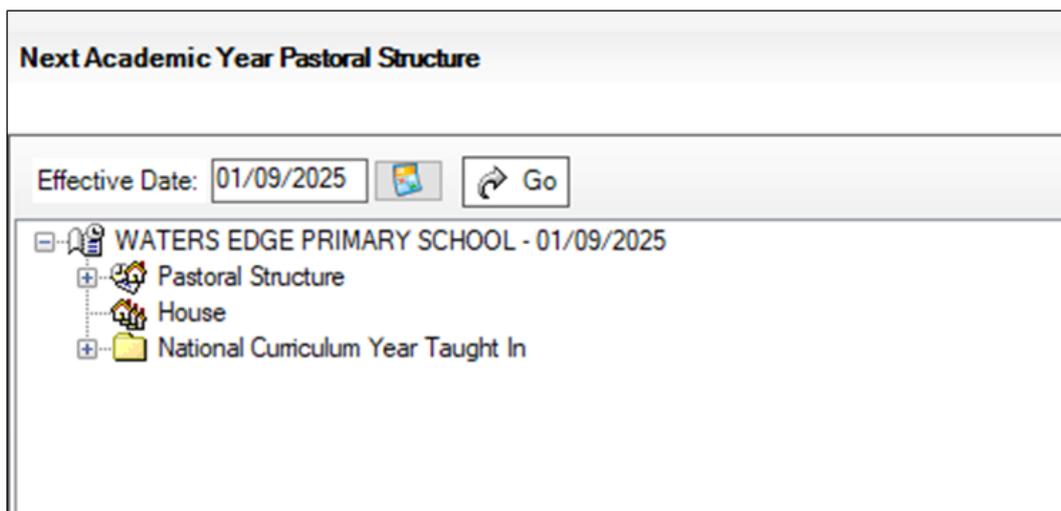
Name	Unusual	Current Year Group	Next Year Group	Current Registration Group	Next Registration Group
+ Current Year Group: N2					
+ Current Year Group: R					
+ Current Year Group: 1					
+ Current Year Group: 2					
+ Current Year Group: 3					
+ Current Year Group: 4					
+ Current Year Group: 5			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

Although it is possible to continue using the Promote pastoral groups screen to see the promotion path for each individual pupil and edit the information if appropriate, it is recommended that you **Save** and close this screen.

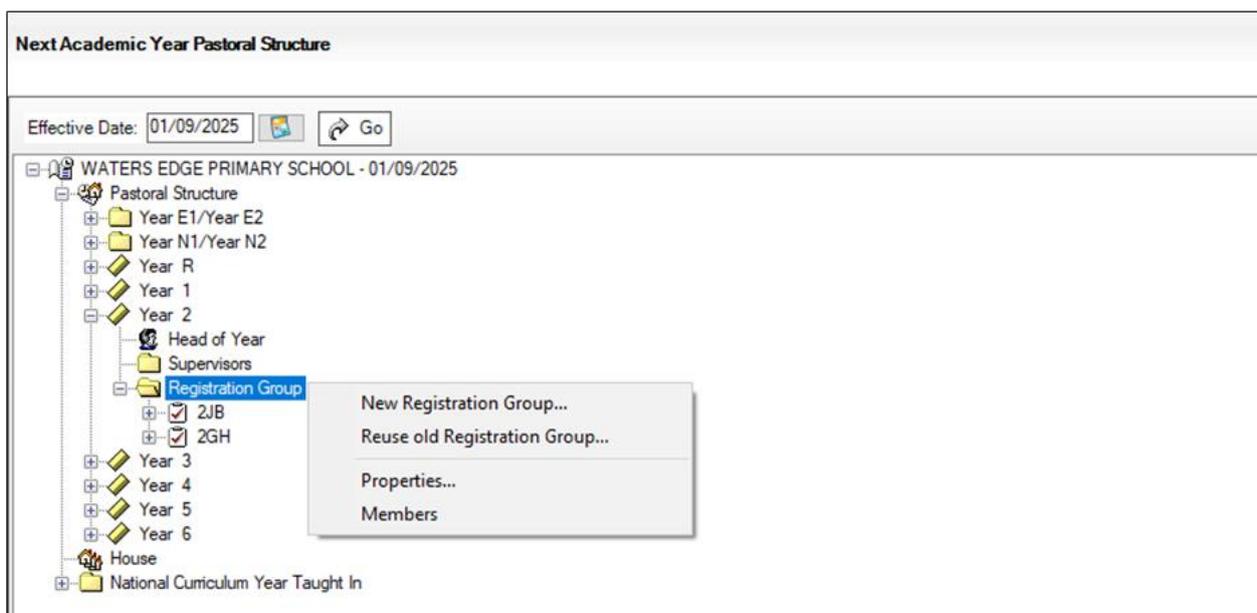
### Next Year's Pastoral Structure

- To view next year's Registration Groups and make any changes that may be necessary select **Focus | School | Pastoral Structure | Next Academic Year Structure**

**Note:** Remember to check that you are looking at the **Next Academic Year Pastoral Structure** which will be displayed in the title bar.



- Click the + sign to the left of **Pastoral Structure** to display next year's Year Groups. Then click the + sign to the left of the Year Group that you want to work with e.g., Year 2
- Right click on **Registration Group** and select **Members**



You will now be able to allocate pupils to their classes by clicking in the appropriate column for each pupil as shown in the following example.

Allocate Students/Applicants : Year 2

**Effective Date Range**  
 From effective date to end of the academic year ( )     Over the whole academic year ( 01/09/2025 - 31/08/2026 )

**Student Status**  
 Students     Accepted Applications     Current Applications (Applied / Offered / Reserved)

**Members** Print    Actions ▾

Name	Gender	Year Group	Reg Group	2JB	2GH
Adesina, Kyra	Female	Year 2	2JB	✓	
Barnes, Luke	Male	Year 2	2JB	✓	
Beinon, Rhys	Male	Year 2	1 ASH		✓
Blake, Antony	Male	Year 2	2GH		✓
Bronislaw, Natalia	Female	Year 2	1 ASH		
Callaghan, Catherine	Female	Year 2	1 OAK		✓
Chao, Bai	Male	Year 2	2GH		✓
Chatterjee, Yazmina	Female	Year 2	1 ASH		✓
Cibrao, Larrissa	Female	Year 2	2GH		✓
Clarke, Oliver	Male	Year 2	2JB	✓	
Cooper, James	Male	Year 2	2JB	✓	
<b>Total</b>				15	15

OK    Cancel

You can add columns if required by clicking the **Actions** button and select the appropriate item e.g., Gender.

Actions ▾

- Gender
- Year
- Reg
- House
- Ethnicity
- Previous School
- Admission no.
- Date of Birth
- View Single
- View Triple

- Right-clicking on a column heading allows you to sort the pupils by that heading and gives you the opportunity to check (tick) all pupils
- Selecting **View Triple** from the **Actions** button will show total pupil numbers allocated to the Registration Groups by gender

<b>Members</b>					
<b>Name</b>	<b>Gender</b>	<b>Year Group</b>	<b>Reg Group</b>	<b>2JB</b>	<b>2GH</b>
Adesina, Kyra	Female	Year 2	2JB	✓	
Barnes, Luke	Male	Year 2	2JB	✓	
Beinon, Rhys	Male	Year 2	1 ASH		✓
Blake, Antony	Male	Year 2	2GH		✓
Bronislaw, Natalia	Female	Year 2	1 ASH		
Callaghan, Catherine	Female	Year 2	1 OAK		✓
Chao, Bai	Male	Year 2	2GH		✓
Chatterjee, Yazmina	Female	Year 2	1 ASH		✓
Cibrao, Larrissa	Female	Year 2	2GH		✓
Male				7	7
Female				8	8
Total				15	15

- When you have finished, click **OK** to save. Repeat for other Year Groups and Registration Groups as appropriate

## Pupils starting in the New Academic Year

### Admission Groups

Pupils that are due to start in your school at a future date can be entered into SIMS in advance and then placed on roll at the appropriate time. Before pupil details for your new intake are entered you will need to create **Admission Groups**.

Pupils in admission groups are available for inclusion in next year's Registration Group lists, attendance registers, etc. but they can easily be removed from SIMS if they do not arrive. Entering as much information as possible at this stage will also help schools to have pupil level data ready in good time for the Autumn Census.

### Housekeeping

Before you create Admission Groups for the new 2025/2026 Academic Year it is recommended that you make historic groups inactive, so they do not show by default.

- Select **Routines | Admission | Admission Groups | Setup**
- Click **Search** then double click on the group you wish to make inactive e.g., 2024/2025 Autumn Year R
- Untick the **Active** box, then click **Save**

**Intake Group Details: 2024/2025 - Autumn Year R**

Save Undo Print

1 Intake Group 2 Admission Groups

---

**1 Intake Group**

Admission Year	<input type="text" value="2024/2025"/>	Name	<input type="text" value="2024/2025 - Autumn Year R"/>
Admission Season	<input type="text" value="Autumn"/>	Active	<input checked="" type="checkbox"/>
Year Group	<input type="text" value="Year R"/>		
Planned Admission	<input type="text" value="40"/>		

---

**2 Admission Groups**

Name	Date Of Admission	
2024/2025 - Autumn Year R(A)	02/09/2024	

New

Open

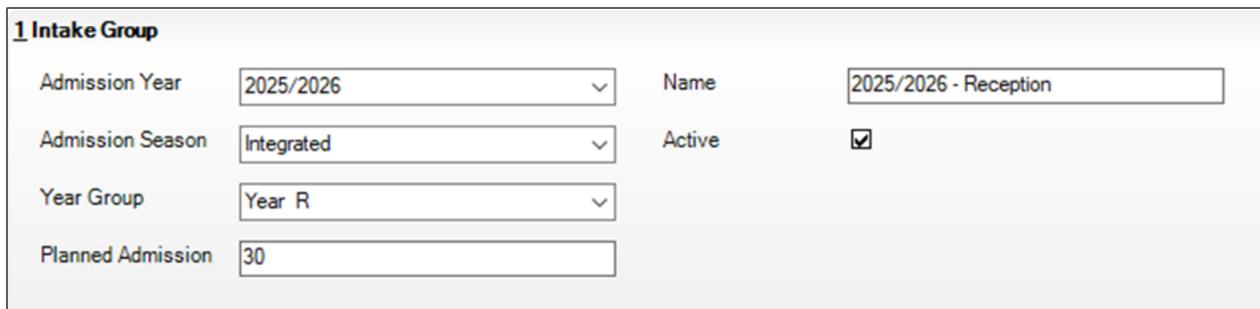
Delete

Repeat the process to make all appropriate groups inactive.

**Note:** If you have any applicants with a status of *Applied* or *Offered* in an Admission Group, you will need to update their status to **Withdrawal** before you can make the group inactive.

## Creating Admission Groups

- To create Admission Groups for an intake, select **Routines | Admission | Admission Groups | Setup**
- Click the **New** button to create a new group

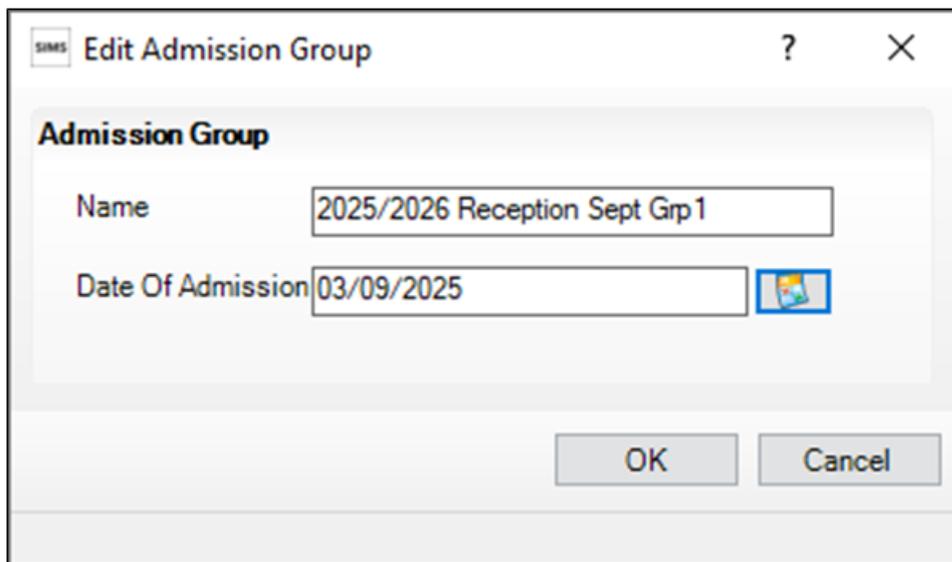


**1 Intake Group**

Admission Year	2025/2026	Name	2025/2026 - Reception
Admission Season	Integrated	Active	<input checked="" type="checkbox"/>
Year Group	Year R		
Planned Admission	30		

Enter the required information in the **Intake Group** panel.

- The **Admission Year** is the Academic Year of admission i.e., 2025/2026
  - The **Admission Season** can be Integrated so that you can use the Intake Group for the entire academic year 2025/2026
  - The **Year Group** is the year that the pupils will be joining
  - The **Planned Admission** is the maximum number of pupils that you can admit in a particular intake
  - The **Name** defaults to Admission Year – Season – Year Group when you click in the field. (This can be changed if required)
- In the second panel **Admission Group** click the **New** button to display the following window



**Edit Admission Group**

**Admission Group**

Name	2025/2026 Reception Sept Grp1
Date Of Admission	03/09/2025

OK Cancel

- The **Name** is the description you want to give to the group
  - The **Date Of Admission** is the earliest date that the pupils will attend school
- Click **OK**

**Important Note:** *The date of admission must be within the new academic year; otherwise, pupils will be admitted to the wrong year group.*

You will be returned to the **Intake Group** Details screen and the **Admission Group** will now be listed in the second panel.

**1 Intake Group**

Admission Year	<input type="text" value="2025/2026"/>	Name	<input type="text" value="2025/2026 - Reception"/>
Admission Season	<input type="text" value="Integrated"/>	Active	<input checked="" type="checkbox"/>
Year Group	<input type="text" value="Year R"/>		
Planned Admission	<input type="text" value="30"/>		

---

**2 Admission Groups**

Name	Date Of Admission	
2025/2026 Reception Sept Grp 1	03/09/2025	<input type="button" value="New"/> <input type="button" value="Open"/> <input type="button" value="Delete"/>
2025/2026 Reception Sept Grp2	08/09/2025	

- If you wish to add more than one **Admission Group** as you have pupils arriving on different days click the **New** button to add them

Remember to give your **Admission Groups** relevant names if you create more than one e.g. 2025/2026 Reception Sept Grp 1, 2025/2026 Reception Sept Grp 2 etc.

- Once you have finished, click the **Save** button and exit

## Entering Applicants (New Pupils)

**Important Note:** Pupils already on roll should **not** be entered as Applicants e.g., existing Nursery pupils moving up to Reception.

Please refer to the table below to ensure pupils are admitted to the correct Year Group based on their date of birth.

Date of Birth	Year Group
01/09/2014 to 31/08/2015	Year 6
01/09/2015 to 31/08/2016	Year 5
01/09/2016 to 31/08/2017	Year 4
01/09/2017 to 31/08/2018	Year 3
01/09/2018 to 31/08/2019	Year 2
01/09/2019 to 31/08/2020	Year 1
01/09/2020 to 31/08/2021	Year R
01/09/2021 to 31/08/2022	Year N2
01/09/2022 to 31/08/2023	Year N1
01/09/2023 to 31/08/2024	Year E2
01/09/2024 to 31/08/2025	Year E1

There are three possible methods of populating Admission Groups with pupils.

- **Manual Entry:** Entering records manually into SIMS from information supplied by your LA Admission Team or from School Enrolment forms
- **Common Transfer Files (CTF):** Import CTFs that have been supplied by the previous school of pupils due to join your school. This is the correct method for transferring pupil information from one school to another. If the previous school have not supplied Common Transfer Files, it is strongly recommended that you ask them to do so
- **Admission Transfer Files (ATF):** Import an ATF that has been supplied by your Admissions Team

**Note:** Some LAs do not supply ATFs and if pupils are already on roll e.g., in Nursery, importing this file may create duplicate records. If you require more information about importing ATF Files, please contact the **School Business Services MIS Service desk**.

### Manual Entry

- Select **Focus | Admission | Application** then click **New**
- Type in basic details, Surname, Forename, Sex and Date of Birth and click **Continue**

SIMS will search for any possible matches already on the system e.g., if the pupil has previously attended your school or if some of their details have already been entered onto the system.

- If a correct match is found e.g., Applicant was previously on roll, highlight the matched name, and click **Open**. You will be taken to the Application details
- If no matches are found, you will be taken straight to the Application details

- If persons matching the details, you have entered are found, their details will be displayed. Check that your new pupil is not already there and click the **New** button to take you to the Application details

The Application screen is very similar to the standard Pupil Details screen and information can be entered in the same way.

**1 Basic Details**

Legal Forename	<input type="text" value="Tom"/>	Photograph	<div style="border: 1px solid gray; width: 100%; height: 100%; display: flex; align-items: center; justify-content: center;"> <span>Click for photographers</span> </div>
Middle Name(s)	<input type="text"/>		
Legal Surname	<input type="text" value="Hardy"/>		
Preferred Surname	<input type="text" value="Hardy"/>		
Preferred Forename	<input type="text" value="Tom"/>		
Date of Birth	<input type="text" value="04/10/2020"/> 		
Current Age	<input type="text" value="4 years, 8 months"/>		
Sex	<input type="text" value="Male"/> 		
Gender Identity	<input type="text"/> 		
Pronoun(s)	<input type="text"/> 		<input type="button" value="History"/>
Pronouns: Only Use in School	<input type="checkbox"/>		
Birth Certificate Seen	<input type="checkbox"/>		
Former UPN	<input type="text"/> 		
UPN	<input type="text"/> 		
Quick Note	<input style="width: 100%; height: 40px;" type="text"/>		

**Note:** Unlike pupils on roll, the **UPN** field in is the **Basic Details** panel not the Registration panel.

The **Registration Details** panel is different to that in the standard Pupil Details screen as it is designed to deal with the application and admission process.

The **Registration Details** panel appears as follows:

**2 Registration Details**

Application Status	Applied		Application Reference Number	
Intake Group	2025/2026 - Year R	...	Admission Group	September 2025 REC Grp 1
Year Group	Year R		Year Taught In	Curriculum Year R
Class	REC PINE		House	
Date Of Admission	01/09/2025		Age On Entry	4 years, 10 months
Admission Number			Enrolment Status	Single Registration
Boarder Status			Late Application	<input type="checkbox"/>
Local UPN				
<input type="checkbox"/> Part-Time				
Start Date				
End Date				

- You will need to select the **Intake** and **Admission Group** using the drop-down arrows
- Once these are selected the **Date of Admission** will default to the expected date of admission previously entered when setting up the Admission Group, however, it may be changed here for each individual applicant
- **Year Taught In** will default to the same as the Year Group and other information such as class (Registration Group) and part time information may be entered now if known
- The **Application Status** will default to Applied, but this can be changed (See section on Changing the Status of Applications)

**Important Note:** The **Application Status** will default to **Applied**, this can be changed to **Accepted**, so the pupil will appear on class list and registers in the new academic year.

### Changing the Status of Applications

The Status options available are:

- **Applied** – Indicates that the child has applied for a place in the Intake Group
- **Offered** – Indicates that the child has been offered a place in the Intake Group
- **Accepted** – Indicates that the child has accepted the place offered
- **Admitted** – Indicates that the child has been admitted into the school
- **Withdrawal** – Indicates that the child has withdrawn their application for a place in the Intake Group

**Note:** Schools do not have to process admissions through each Status; Applicants may be changed directly from the Applied or Offered Status to Admitted. However, Applicants with a Status of Applied or Offered are held under a different focus for reporting purposes. You will therefore need to change their status to Accepted in order for them to be included on lists which you may want to print in advance of them being admitted e.g. Next Year's Registration Groups.

- Pupils entered into Admission Groups manually will default to the first status: **Applied**
- Pupils imported via CTF also default to **Applied**

The Application Status may be changed individually in the Registration Details panel of the Application Screen.

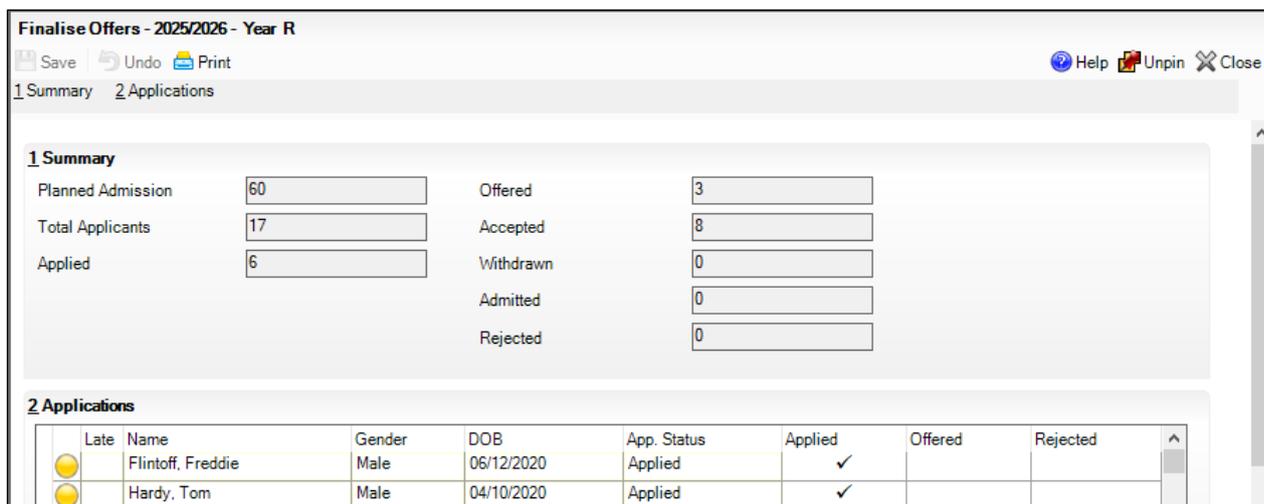
Alternatively, the status of applications may be changed for groups of applicants via:

- **Routines | Admission | Finalise Offers**
- **Routines | Admission | Accept Applications**

### Updating to Offered

- Select **Routines | Admission | Finalise Offers**
- Search for the required **Intake Group** and double click on it or highlight it and click **Open**

The following screen will appear:



Finalise Offers - 2025/2026 - Year R							
1 Summary		Planned Admission	60	Offered	3		
	Total Applicants	17	Accepted	8			
	Applied	6	Withdrawn	0			
			Admitted	0			
			Rejected	0			
2 Applications							
Late	Name	Gender	DOB	App. Status	Applied	Offered	Rejected
<input type="checkbox"/>	Flintoff, Freddie	Male	06/12/2020	Applied	<input checked="" type="checkbox"/>		
<input type="checkbox"/>	Hardy, Tom	Male	04/10/2020	Applied	<input checked="" type="checkbox"/>		

- Tick the **Offered** column for those who have been offered a place, then click **Save**



2 Applications							
Late	Name	Gender	DOB	App. Status	Applied	Offered	Rejected
<input type="checkbox"/>	Tang, James	Male	23/06/2021	Offered		<input checked="" type="checkbox"/>	
<input type="checkbox"/>	Teller, Jax	Male	10/04/2021	Applied		<input checked="" type="checkbox"/>	

**Note:** You can also tick the Rejected column to indicate those pupils that are not going to be offered a place. However, it is recommended that you leave the pupils without an offer with a status of Applied so they can remain on your waiting list.

## Updating to Accepted

- Select **Routines | Admission | Accept Applications**
- Search for the required **Intake Group** and double click on it or highlight it and click **Open**

The following screen will appear:

**1 Summary**

Planned Admission	60	Accepted	8
Total Applicants	17	Withdrawn	0
Applied	5	Rejected	0
Offered	4	Admitted	0

**2 Applications**

Current Application Status: Offered

Name	Gender	DOB	Application Status	Offered	Accepted	Withdrawal
Slater, Stacey	Female	25/12/2020	Offered	✓		
Tang, James	Male	23/06/2021	Offered	✓		

**Note:** The Applications panel will default to showing Applicants with a current Application Status of Offered. If you have Applicants in the Intake Group with the status of Applied, you should change the Current Application Status to Applied.

- Search for applicants by **Current Application Status** e.g., Applied or Offered
- Then tick the **Accepted** column for those who have accepted a place, then click **Save**

**Note:** The Accept Applications option can also be used to change the status to **Offered** or to **Withdraw** any applicants who have declined the offer of a place.

## Moving Applicants between Intake and Admission Groups

It is possible to move Applicants from one **Intake Group** to another e.g.

- You may have some Applicants in a previous Nursery Intake Group who were unsuccessful in getting a place, but they are still in SIMS with an Application Status of Applied
- They have now applied for a place in Reception. You can move them to your current Reception Intake Group

It is also possible to move Applicants in an Intake Group to a different **Admission Group** e.g.

- You may like to have two Admission Groups for your current Reception Intake Group with different start dates to reflect a staggered intake

- Select **Routines | Admission | Admission Groups | Transfer Applications**

**Members**

Intake Group: 2025/2026 - Year R  
 Admission Group: September 2025 REC Grp 1

Name	Date of Birth
Cawood, Nathan	09/11/2020
Flintoff, Freddie	06/12/2020
Golightly, Holly	11/09/2020
Hardy, Tom	04/10/2020
Long, Neville	30/11/2020
Royce, Ryan	20/08/2021
Sawyer, Peyton	01/05/2021
Styles, Harry	04/10/2020

-> <-

Intake Group: 2025/2026 - Year R  
 Admission Group: September 2025 REC Grp 2

Name	Date of Birth
Achmed, Dobir	12/11/2020
Davis, Amy	29/03/2020
Flintoff, Harley	06/12/2020
Honeywell, George	04/06/2021
Scott, Danielle	14/02/2021
Slater, Stacey	25/12/2020
Snape, Louisa N	12/11/2020
Tang, James	23/06/2021
Teller, Jax	10/04/2021

- On the left-hand side of the screen, choose the Intake Group and Admission Group that you want to move Applicants from
- On the right-hand side of the screen, choose the Intake Group and the Admission Group that you want to move the Applicants to
- Click on the appropriate Applicants on the left and use the  button in the centre of the screen to move the pupils to the correct Group (you can multi select Applicants by using your Shift and Ctrl keys)
- Click **Save**

The following message will appear:

**Transfer Admission Group Members** ✕

 The date of admission and year group for the transferred applications will be updated.

Do You wish to continue?

- Click **OK**

## Allocating Applicants to Next Year's Registration Groups

There are two ways of adding Applicants to next year's Registration Groups.

- The Registration Group can be entered for individual applicants in the Registration Details panel of the Application screen, either as you are entering the applicant or later by re-selecting and editing the record

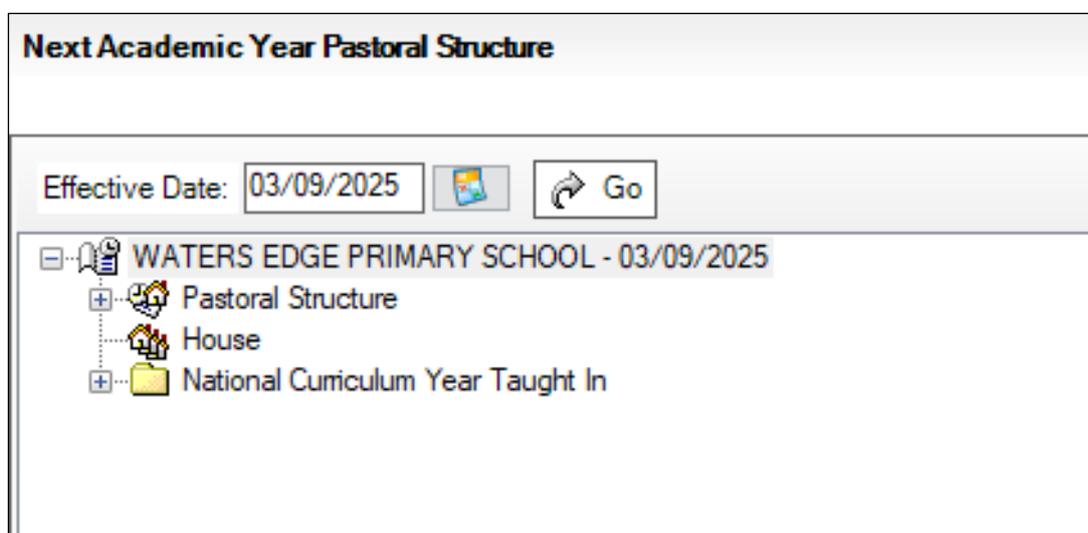
**Note:** Only current Reg Group names will be available in the Registration Details panel of the Application screen. If you are allocating pupils to any Reg Groups that have been newly created for the **2025/2026** Academic Year, you will need to use the following option.

- Using the Registration Group Members grids via Next Year's Pastoral Structure. This is the quickest method to allocate pupils to registration groups and to check that all pupils have been allocated to the correct group

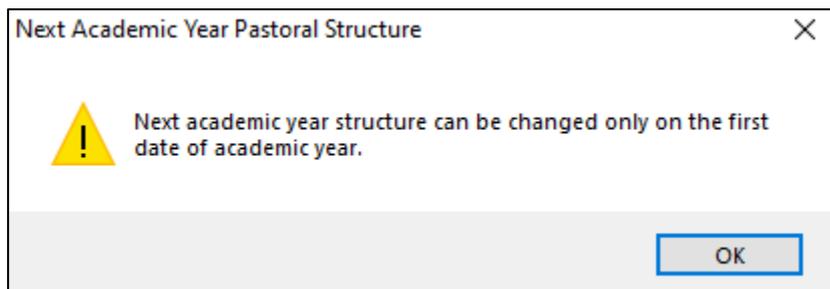
- Select **Focus | School | Pastoral Structure | Next Academic Year Structure**

**Note:** Remember to check that you are looking at the **Next Academic Year Pastoral Structure** which will be displayed in the title bar.

- Change the effective date to the admission date for the Admission Group i.e., the date that the pupils are being admitted
- Click **Go**

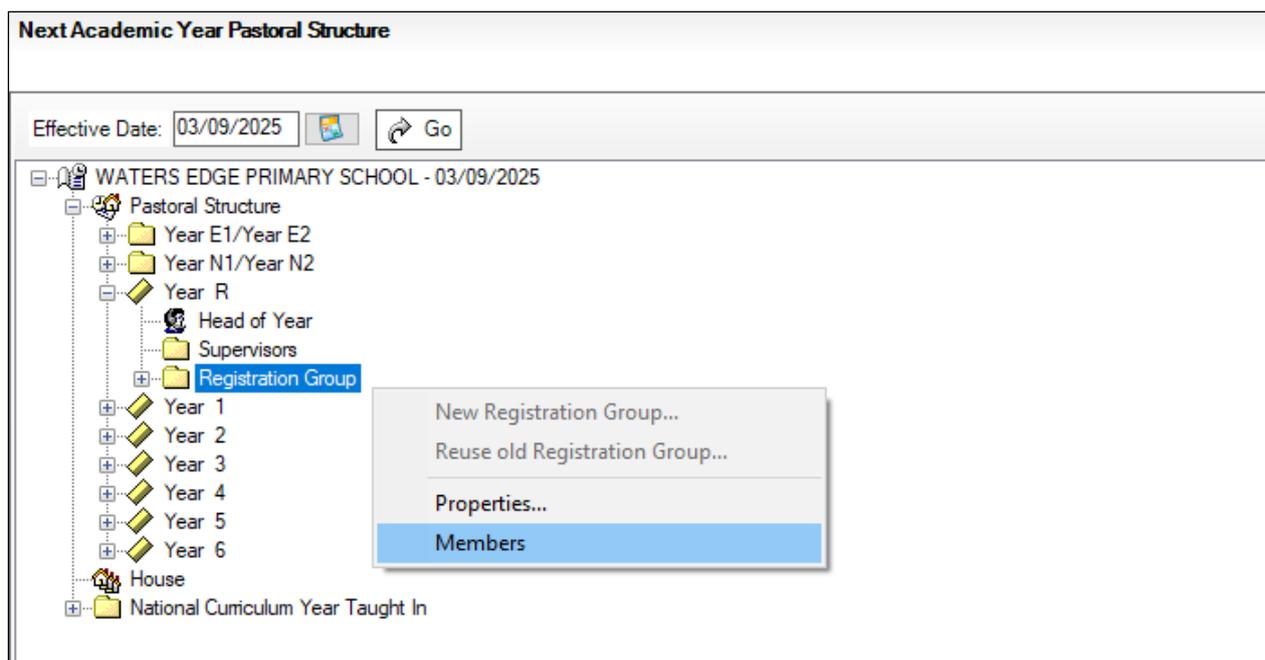


The following window will appear.



This message is ok as you are not changing the structure, just allocating pupils to Registration Groups.

- Click **OK** to continue
- Click the + sign to the left of **Pastoral Structure** to display next year's Year Groups
- Then click the + sign to the left of the Year Group that you want to work with e.g., Year R
- Right click on **Registration Group** and select **Members**



You will now be able to allocate pupils to next year's Registration Groups by clicking in the appropriate column for each pupil as shown in the following example.

SIMS Allocate Students/Applicants : Year R

**Effective Date Range**  
 From effective date to end of the academic year ( )  Over the whole academic year ( 01/09/2025 - 31/08/2026 )

**Student Status**  
 Students  Accepted Applications  Current Applications (Applied / Offered / Reserved)

**Members** Print Actions

Name	Gender	Year Group	Reg Group	REC ELM	REC PINE
Cawood, Nathan	Male	Year R	REC PINE		✓
Flintoff, Freddie	Male	Year R	REC PINE		✓
Golightly, Holly	Female	Year R	REC ELM	✓	
Hardy, Tom	Male	Year R	REC PINE		✓
Hussain, Suki	Female	Year R			✓
Johnes, Jada	Female	Year R		✓	
Kalinski, Alicja	Female	Year R			✓
Kaur, Imran	Male	Year R		✓	
Khans, Yazmina	Female	Year R		✓	
Lester, Joshua	Male	Year R			✓
Long, Neville	Male	Year R	REC ELM	✓	
<b>Total</b>				9	10

OK Cancel

You may change which pupils are displayed using the Student Status options:

- **Students** are those already on the school roll and are shown in grey
- **Accepted Applications** are applicants with an Application Status of Accepted and are shown in pink
- **Current Applications** are applicants with an Application Status of Offered or Applied and are shown in orange

*Reminders:*

- *Right-clicking on a column heading allows you to sort the pupils by that heading and gives you the opportunity to check (tick) all pupils*
- *The Actions menu allows different information about the pupils to be displayed*
- When you have finished allocating the Applicants to classes it is recommended that you click in the Effective Date Range **Over the whole academic year** to ensure that memberships of Reg Groups starts from the date of admission
- Click **OK** to save your changes

## Creating Lists and Registers for the new Academic Year

When you have completed the **Promotion** routine and allocated pupils to next year's Registration Groups via **Next Year's Pastoral Structure** you can generate reports, registers and lists for September.

### Printing Next Year's Registration Group Lists

Any report which has an Effective Date attached may be used to print out lists for next year, e.g., next year's Registration Groups, in advance by setting this date forward. To be sure that all new pupils are included, this date must be set to after the latest expected Date of Admission.

The standard SIMS-defined reports called Registration Groups (Dated.....) are available for this purpose.

**Reminder:** Applicants must have an Application Status of Accepted in order to be included.

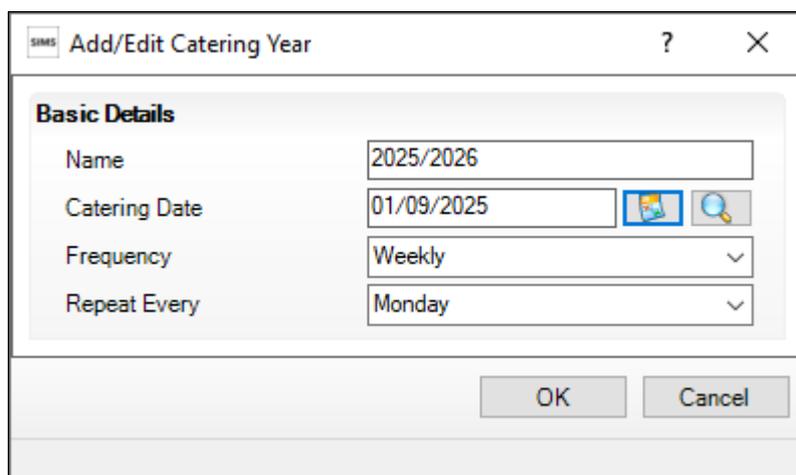
## SIMS Dinner Money

**This section applies to schools using SIMS Dinner Money only.**

### Catering Year

You will need to add a new **Catering Year**.

- Select **Tools | Dinner Money | Setup**
- Go to panel **2 Catering Returns**
- Click the **New** button and enter a **Name** for the Catering Year e.g., 2025/2026
- Enter the **Catering Date** i.e., the start of the first week school meals are to be provided in the new academic year



- Click **OK**

**2 Catering Returns**

Catering Years

Name	Catering Date	Frequency	Repeat Every
2025/2026	01/09/2025	Weekly	Monday
2023/2024	03/04/2023	Weekly	Monday
2022/2023	04/04/2022	Weekly	Monday
2021/2022	05/04/2021	Weekly	Monday
2020/2021	06/04/2020	Weekly	Monday
2019/2020	06/04/2019	Weekly	Monday
2018/2019	06/04/2018	Weekly	Monday

Level of Debt:   
 Level of Credit:   
 Location/Cost Cntr/Site No:   
 Contract Area:

- Click **Save**

### Increase in School Meal Charges

If the charge for paid school meals is increasing in September, you will need to add the new charge to reflect this.

- Select **Tools | Dinner Money | Pupil Meal Definitions** and click **Search**
- Select the appropriate Paid School Meal definition
- Under charges select **New**
- Add the new amount with the appropriate start date

SIMS Add/Edit Meal Charge

**Basic Details**

Start Date:

End Date:

Charge:

- Click **OK**, then **Save**

**Pupil Meal Definition Detail**

Save Undo Print

1 Basic Details 2 Charges

**1 Basic Details**

Description: Paid School Meal

Meal Type: School Meal

Year Group(s):

Description	Year Group
<input type="checkbox"/>	Year 2
<input checked="" type="checkbox"/>	Year 3
<input checked="" type="checkbox"/>	Year 4
<input checked="" type="checkbox"/>	Year 5
<input checked="" type="checkbox"/>	Year 6

Check All  
Uncheck All

**2 Charges**

Start Date	End Date	Charge
01/09/2025		3.50
02/09/2024	31/08/2025	0.00

New  
Open  
Delete

The end date for the previous charge will automatically populate.

**Note:** All pupils in Key Stage 2 in London local authority schools continue (since September 2023) to have their meals funded by the Mayor of London and therefore should not be charged for their meals.

### Pupil and Staff Balances

It is advisable to look at pupil and staff balances towards the end of the summer term and collect outstanding money (debts) and issue refunds as appropriate. This is especially important for pupils that are due to leave in the summer term e.g., Year 6 pupils.

Although dinner money balances will still be available for leavers, it may be more difficult to contact these pupils when they have left your school.

It is recommended that you print off a copy of the Pupil Balances and Staff Balances report from the start of the 2024/2025 Catering Year to the last school day of the academic year as a record of all meals taken, transactions and balances at the year end.

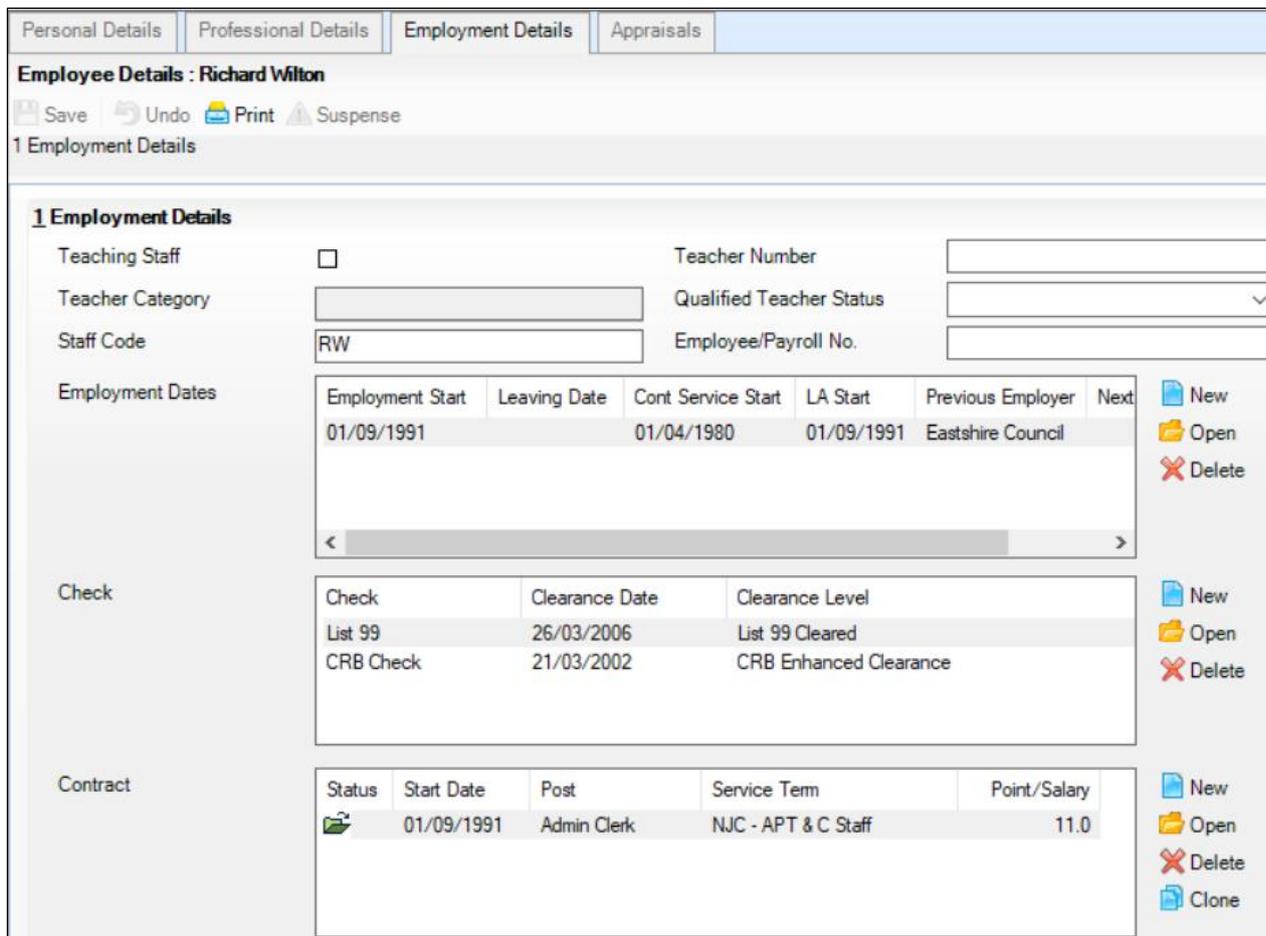
These reports are available via

- **Reports | Dinner Money | Finance | Pupil Balances**
- **Reports | Dinner Money | Finance | Staff Balances**

## Staff Leavers

You will need to enter a **Leaving Date**, a **Contract End Date** or **Service Agreement End Date** and a **Destination**, for any staff leaving your school.

- Select **Focus | Person | Staff | Staff Details** and select the **Employment Details** tab



**Employee Details : Richard Wilton**

Save Undo Print Suspense

1 Employment Details

**1 Employment Details**

Teaching Staff  Teacher Number

Teacher Category  Qualified Teacher Status

Staff Code  Employee/Payroll No.

Employment Dates

Employment Start	Leaving Date	Cont Service Start	LA Start	Previous Employer	Next
01/09/1991		01/04/1980	01/09/1991	Eastshire Council	

Check

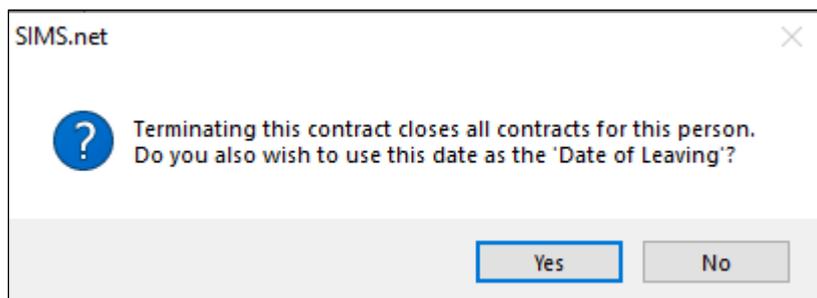
Check	Clearance Date	Clearance Level
List 99	26/03/2006	List 99 Cleared
CRB Check	21/03/2002	CRB Enhanced Clearance

Contract

Status	Start Date	Post	Service Tern	Point/Salary
	01/09/1991	Admin Clerk	NJC - APT & C Staff	11.0

- Open the current Contract and enter the **Contract End Date** and **Destination**
- Then click **Save**

The following message will appear:



- Click **Yes** and then **Save**

A **Leaving Date** will automatically be generated in the **Employment Dates** panel.

Employment Dates	Employment Start	Leaving Date	Cont Service Start	LA Start	Previous Employer	Next	
	12/04/1989	31/08/2025	12/04/1989	12/04/1989	Self Employed		<input type="checkbox"/> New <input type="checkbox"/> Open <input checked="" type="checkbox"/> Delete

**Note:** Staff Leavers e-mail accounts will be disabled after the date of leaving has passed for schools using LGFL USO Auto Update.

## New Staff

New staff will need to have SIMS accounts created. If you would like School Business Services to create the accounts for you, please email the request to the MIS service desk team. The email should be from a member of the Senior Leadership Team, stating the name(s) of the staff member(s) together with their role and the level of access required in SIMS.

*If you are supported by another SIMS Support partner, then contact them directly for advice if required.*

**Note:** A SIMS Personnel record must be created before a SIMS account can be generated. It is also recommended that you make the SIMS accounts inactive for any staff members that have left. If you need help de-activating the SIMS accounts for any staff that have left your school, please also contact the **School Business Services MIS Service desk** or your own **SIMS Support team**.

## PART 2: To be completed after the new academic year has started

### Admitting the New Intake

Once the new academic year has started, you can admit the Applicants (new pupils) into your school.

**Important Note:** It is recommended that you don't admit pupils before the start of the new academic year, as you can't be sure that all the pupils will arrive on the day.

- Select **Routines | Admissions | Admit Applications**
- Search for the required **Intake Group** and double-click or highlight and click **Open**

The following screen will appear:

**Admit Applicant Detail: 2025/2026 - Year R**

Save Undo Print

1 Summary 2 Applications

---

**1 Summary**

Total Applicants	<input type="text" value="17"/>	Accepted	<input type="text" value="8"/>
Planned Admission	<input type="text" value="60"/>	Withdrawn	<input type="text" value="0"/>
Applied	<input type="text" value="5"/>	Rejected	<input type="text" value="0"/>
Offered	<input type="text" value="4"/>	Admitted	<input type="text" value="0"/>

---

**2 Applications**

Application Status

Name	Gender	Date Of Birth	Date Of Admission	Enrolment Status	Application Status	UPN	Assign UPN	Admitted	Withdrawal
Achmed, Dobir	Male	12/11/2020	08/09/2025	Single Registration	Admitted		No Change	✓	
Cawood, Nathan	Male	09/11/2020	01/09/2025	Single Registration	Admitted		No Change	✓	
Davis, Amy	Female	29/03/2020	08/09/2025	Single Registration	Accepted		No Change		
Flintoff, Harley	Male	06/12/2020	08/09/2025	Single Registration	Accepted		No Change		
Golightly, Holly	Female	11/09/2020	01/09/2025	Single Registration	Accepted		No Change		
Honeywell, George	Male	04/06/2021	08/09/2025	Single Registration	Accepted		No Change		

- Find the applicants by selecting the appropriate **Application Status**
- Place a tick in the **Admitted** column for any pupils that you wish to admit. If you wish to admit the entire group, clicking the **Admit All** button will tick all pupils in the group.

**Note:** If a pupil does not have a UPN and you did not issue one at the Application stage you can allocate them one here by selecting **Assign Permanent UPN** against their record, a UPN will be generated on admission.

**Note:** The **Assign Permanent UPN** button will assign to All applicants who do not yet have one. UPNs should only be issued if you are sure that the pupil does not have one from a previous school or nursery.

- Once you have admitted all the pupils that you want to, click **Save**. The admitted pupils will disappear from the list and will now appear on your school roll

## Withdrawing Applicants

If an Applicant is now not joining your school, you should withdraw them from the Admission Group using the withdrawal process.

- Select **Routines | Admissions | Admit Applications**
- Search for the required Intake Group and double-click or highlight and click **Open** to show the following screen
- Find the applicants by selecting the appropriate **Application Status**
- Place a tick in the **Withdrawal** column for any pupils that you wish to withdraw
- Click **Save**

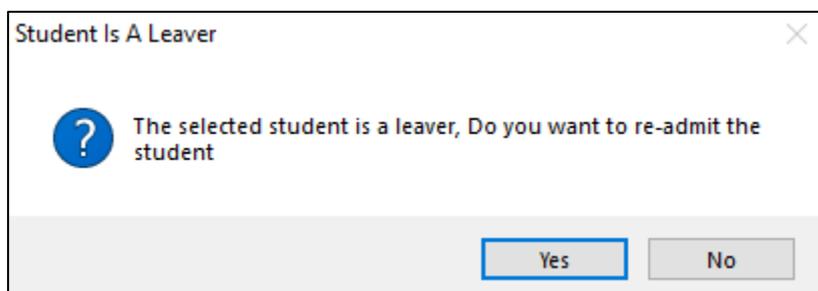
**Note:** Applicants can also be Withdrawn via **Routines | Admissions | Accept Applications**.

## Re-Admitting Pupils

If a pupil is re-joining your school having previously left it is important that you re-admit them. Don't just remove the date of leaving or add them as a new pupil.

- Select **Focus | Pupil | Pupil Details**
- Click the **New** button as if you are going to enter a new pupil
- Enter basic details for the pupil, e.g., Surname and Gender
- Click the **Continue** button
- A list of matched pupils will appear. Highlight the pupil that you want to re-admit and click the **Open** button

You will receive the following message.



- Click **Yes** to open the pupil's record. You may now enter the pupil's new date of admission, Registration Group, etc., update any other information and **Save**

## Attendance Routines

### Printing the Official Register

Regulations require that the Official Register be printed out at least once a month and kept for at least seven years from the date of entry, This is a requirement under the School Attendance (Pupil Registration) (England) Regulations. Make sure that you have printed off your official registers for academic year 2024/2025.

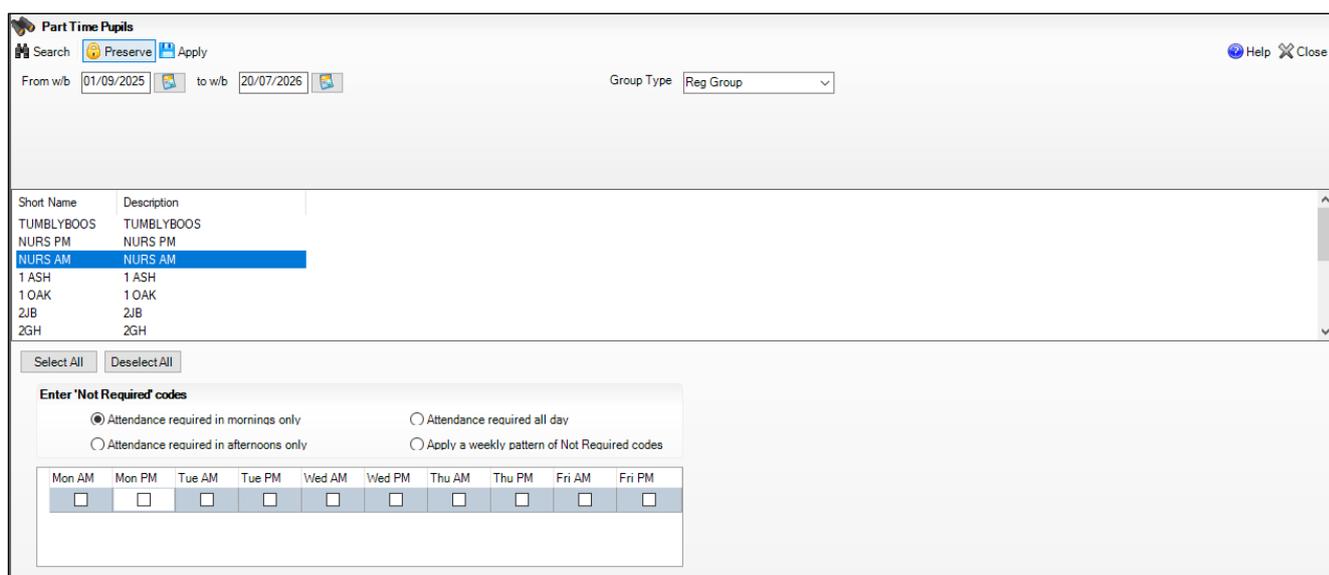
Before printing you should deal with missing marks and add reasons for absence for the months you need to print.

- To generate the Official Register report, select **Reports | Attendance | Whole Group Pupil Reports | Official Register Report**

### Use the Part-Time Pupils Routine to Add Not Required Codes

This routine enables you to add Not Required Codes (**X** code) to part-time pupils of non-compulsory school age, e.g., Nursery pupils.

- Select **Tools | Setups | Attendance Setup | Part Time Pupils**
- Enter the date range to apply the X code over the academic year
- Change the **Group Type** from the default setting of Part Time Group to **Reg Group**
- Click **Search**
- Highlight the appropriate Reg Group e.g., AM Nursery
- Select Attendance required in the mornings only
- Click on the **Lock** to change to **Overwrite** then click **Apply**



An **X** will then appear in pupil attendance records for sessions where they are not required to attend.

- Repeat this as required for other Reg Groups e.g., PM Nursery Attendance required in afternoons only

## Nursery and Reception Pupils - Essential Routines

### End Part-Time Status for Pupils who are now Full-Time

If you have not already done so, you **MUST** ensure that any pupils that are now full-time who were previously part-time have an end date under **Part-Time Details** in the Registration panel of their record.

2 Registration							
Class	NURS AM	House					
Year Group	Year N2	Year Taught In	Curriculum Year N2				
Enrolment Status	Single Registration	Boarder Status	Not a Boarder				
Admission Date	02/09/2024	Admission Number	002024				
Former UPN		Attendance Mode	All day				
UPN	E823299924010	Local UPN					
Part Time Details	<table border="1"> <thead> <tr> <th>Start Date</th> <th>End Date</th> </tr> </thead> <tbody> <tr> <td>02/09/2024</td> <td>31/08/2025</td> </tr> </tbody> </table>	Start Date	End Date	02/09/2024	31/08/2025	<p>New</p> <p>Open</p> <p>Delete</p>	
Start Date	End Date						
02/09/2024	31/08/2025						

### Part-Time Status for New Pupils

Ensure that all new part-time pupils have a start date for their part-time status recorded under **Part-Time Details** in the Registration panel of their record.

2 Registration							
Class	NURS PM	House					
Year Group	Year N2	Year Taught In	Curriculum Year N2				
Enrolment Status	Single Registration	Boarder Status	Not a Boarder				
Admission Date	03/09/2025	Admission Number	002027				
Former UPN		Attendance Mode	All day				
UPN	J823299924003	Local UPN					
Part Time Details	<table border="1"> <thead> <tr> <th>Start Date</th> <th>End Date</th> </tr> </thead> <tbody> <tr> <td>03/09/2025</td> <td></td> </tr> </tbody> </table>	Start Date	End Date	03/09/2025		<p>New</p> <p>Open</p> <p>Delete</p>	
Start Date	End Date						
03/09/2025							

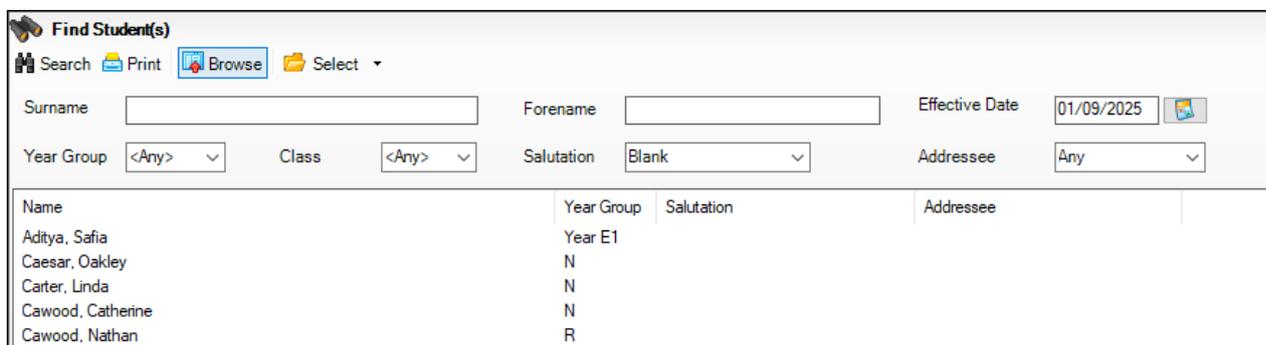
## Housekeeping and Tidying Routines

The following routines are not essential, but it is good practice to tidy your data at the start of the academic year.

### Update Parental Salutation and Addressee

You may have generated the Parental Salutation and Addressee fields individually when entering your new pupils. However, this routine will ensure that they are populated for new pupils and any existing pupils for whom this information is missing.

- Select **Routines | Pupil | Update Parental Salutation / Addressee | Parental**
- Search for all pupils where the **Salutation** is blank
- Click the drop-down arrow on the **Select** button and choose **All** to select all pupils on the list



**Find Student(s)**

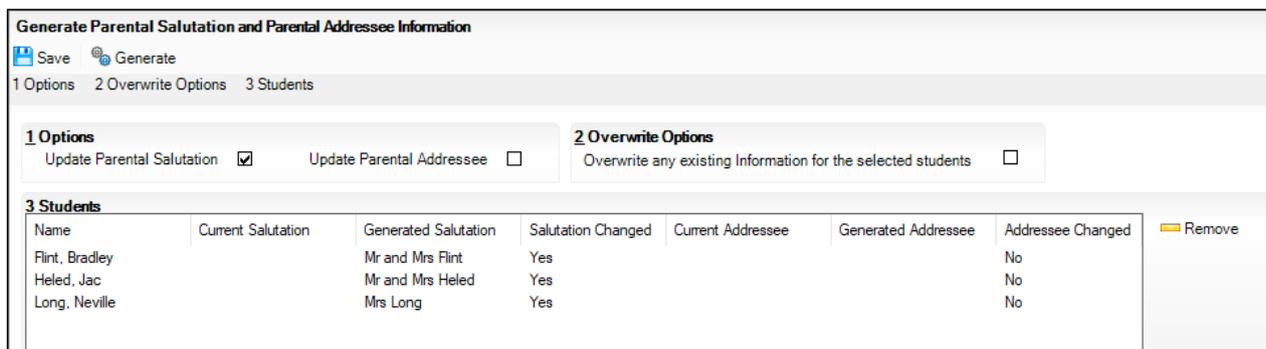
Search Print Browse Select

Surname:  Forename:  Effective Date: 01/09/2025

Year Group: <Any> Class: <Any> Salutation: Blank Addressee: Any

Name	Year Group	Salutation	Addressee
Aditya, Safia	Year E1		
Caesar, Oakley	N		
Carter, Linda	N		
Cawood, Catherine	N		
Cawood, Nathan	R		

- Tick the box **Update Parental Salutation** and click the **Generate** button



**Generate Parental Salutation and Parental Addressee Information**

Save Generate

1 Options 2 Overwrite Options 3 Students

**1 Options**

Update Parental Salutation  Update Parental Addressee

**2 Overwrite Options**

Overwrite any existing Information for the selected students

**3 Students**

Name	Current Salutation	Generated Salutation	Salutation Changed	Current Addressee	Generated Addressee	Addressee Changed	Remove
Flint, Bradley		Mr and Mrs Flint	Yes			No	
Heled, Jac		Mr and Mrs Heled	Yes			No	
Long, Neville		Mrs Long	Yes			No	

- Click **Save**

Repeat the process to generate the **Parental Addressee** for pupils where **Addressee** is blank.

## Other Housekeeping Tasks

Several housekeeping routines can be carried out by selecting **Tools | Housekeeping | General**.

### Name Format

This ensures that names are displayed in a consistent way throughout your SIMS system.

- Select the type of persons that you want to apply the name format to, for example Students/Applicants or Staff
- Now select how you want each component of the names to appear, either Title Case or UPPERCASE
- Click the **Apply** button

### Reset Parental Ballot Flags

- Clicking the **Apply** button here will reset the parental ballot flags in SIMS so that all Mothers and Fathers and those with parental responsibility are shown as being eligible for a parental ballot

### Update Mailing Point

- Click **Apply** here if you wish to designate one pupil in the family as the mailing point for parental correspondence

This can either be the oldest or youngest child.

**Housekeeping**

Save Undo Print

1 Name Format 2 Reset Parental Ballot Flags 3 Update Mailing Point

---

**1 Name Format**

Apply To	UPPERCASE	Title Case
Students / Applicants <input type="checkbox"/>	Preferred Surname <input checked="" type="radio"/>	<input type="radio"/>
Staff <input type="checkbox"/>	Legal Forename <input type="radio"/>	<input checked="" type="radio"/>
Contacts <input type="checkbox"/>	Middle Name(s) <input type="radio"/>	<input checked="" type="radio"/>
Agents <input type="checkbox"/>	Preferred Forename <input type="radio"/>	<input checked="" type="radio"/>

Example: Peter John O'MALLEY-SMITH Apply

---

**2 Reset Parental Ballot Flags**

This routine marks contacts as eligible for the parental ballot if they are mothers or fathers of on-roll students (or have parental responsibility) on the effective date. All other contacts will be set as not eligible

Effective Date  Include accepted pre-admission students due to be on roll on the effective date?  Apply

---

**3 Update Mailing Point**

This routine identifies one pupil at each address as the mailing point. Other children at the same address will be marked as NOT the mailing point

Effective Date  Mailing Point  Apply

