SBS
School Business Services

Preparing for the School Census Summer 2016 Return

English Primary and Middle deemed Primary, Nursery, Special, All-through Primary and PRU Primary phase

SIMS

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Accredited Support

School Census Summer 2016 Preparation Check List

Use this check list to tick off each of the preparation tasks when they have been completed.

Complete	Task Description
☐	Check with your System Administrator/Manager that you have the appropriate permissions to run the School Census and to record associated data (please see *Setting Permissions* on page *2*).
☐	Upgrade to the SIMS 2016 Spring Release (SIMS 7.168) or later as soon as possible to enable dry runs to be carried out.
☐	Check with your System Administrator/Manager that the latest fileset version has been imported (please see *Importing Revised Filesets for Validation and Reports* on page *4*).
☐	Carry out a dry run to determine what information needs to be updated (please see *Why Carry out a Dry Run?* on page *9*).
☐	Check School Level information, e.g. establishment details, school email, etc. (please see *Checking Establishment Details* on page *17*).
☐	Ensure that leavers and re-admissions have been recorded (please see *Recording Leavers and Re-Admissions* on page *25*), and that any student records created in error have been deleted (please see *Deleting Unwanted Pupil Records* on page *28*).
☐	Check the pupil's basic details, e.g. name, date of birth, gender, etc. (please see *Checking a Pupil's Basic Details* on page *28*).
☐	Check the pupil's various registration details, e.g. enrolment status, admission date, year taught in, UPN, etc. (please see *Checking Registration Details* on page *30*).
☐	Check the pupils home address information (please see *Checking Home Address Information* on page *41*).
☐	Check the pupil's eligibility for free school meals (please see *Checking Free School Meals Eligibility* on page *42*).
☐	Check the pupil's ethnic and cultural information (please see *Checking Ethnic and Cultural Information* on page *43*).
☐	Check the applicable information recorded in the **Additional Information** panel (please see *Checking Additional Information* on page *44*).
☐	Check Special Educational Needs information (please see *Checking Special Educational Needs Information* on page *46*).
☐	Check exclusions information (please see *Preparing Exclusions Information* on page *48*) (not applicable to Nursery schools).
☐	Check attendance data (please see *Preparing Attendance Information* on page *53*) (not applicable to Nursery or Special schools).

Complete	Task Description
☐	Check Hours at Setting and Funded Hours information (applicable to schools that have 2, 3 or 4 year olds pupils only).

Notes

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01 | **Introduction**

Introduction

This preparation guide has been produced to help you to identify the most common tasks that need to be carried out before running the School Census Summer 2016 Return.

The information in this guide applies to all LA maintained Nursery, Primary, Middle deemed Primary, All-Through (nursery and primary phase) and Special schools, and Pupil Referral Units (primary phase). It also applies to Academies that cover any of these school phases.

Where the information relates to a specific school phase, it is indicated in red, e.g. Applicable to Special schools only.

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

How has the School Census Summer Return Changed since Last Year?

Changes to the return include the following:

Key Dates for the School Census 2016 Summer Return

Census Date: 19/05/2016

Free School Meal Eligibility collection period: 22/01/2016 to 19/05/2016

Attendance collection period: 01/01/2016 to 27/03/2016 (not applicable to Nursery schools and Special schools)

Exclusions collection period: 01/09/2015 to 31/12/2015 (not applicable to Nursery schools)

Learner Support collection period: 01/08/2015 to 19/05/2016 (not applicable to Nursery and Primary schools)

Age at Date: 31/08/2015.

Improved Validation Errors Summary Display

Routines | Statutory Returns | School Census

The width of the columns in the **Validation Errors Summary** panel have been adjusted to enable as much information as possible to be displayed.

More Information:
Resolving Validation Errors and Checking Queries on page *10*

On-Roll Basic Detail Report - Display Change

Routines | Statutory Returns | School Census

In the On Roll Basic Report, the identification of pupils who are in a year group that is different to that expected (based on their date of birth) has been simplified. In such cases, the background colour of the applicable cell in the **Year Taught In** column is now yellow.

Providing Cohort Information when Designing Reports

Reports | Design Reports

To enable schools to create reports based on cohorts so that items (e.g. pupil premium) collected in the School Census return can be tracked, a new sub-report has been made available.

The Statutory Returns sub-report is located in the Student data area (the last node). Three options are available for selection under the sub-report: **Authorised Date**, **File Name** and **Description**.

Additional Resources:
Designing and Running Reports handbook

Setting Permissions

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

Producing the Return

To produce the return, you must be a member of the Returns Manager user group in System Manager.

Editing and Preparing Data

Users who edit and prepare data must have permissions to access additional areas of SIMS, e.g. pupil details, school details, etc. These users must be a member of any of the following user groups in System Manager:

- Administration Assistant
- Admissions Officer
- School Administrator.

Importing Revised Files

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 <u>between</u> SIMS releases. To use the Import Fileset functionality (via **Tools | Setups | Import Fileset**), you must be a member of any 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, available on our My Account website (https://myaccount.capita-cs.co.uk).

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 My Account website (https://myaccount.capita-cs.co.uk).

To find the spreadsheet, search for `<sims version> sims permissions spreadsheet`, e.g. `7.168 sims permissions spreadsheet`.

What Version of SIMS is Required?

In order to run the return, you must have the SIMS 2016 Spring Release (7.168) or later installed.

To check the version of SIMS installed, open SIMS then select **Help | About SIMS**. A dialog similar to the following graphic is displayed. The version should read 7.168 or later.

Importing Revised Filesets for Validation and Reports

Applicable to the Personnel Officer, Returns Manager and System Manager

The Validation Errors Summary and the Summary report are derived from files supplied by the Statutory Body. In addition, SIMS provides detail reports to enable the checking of data used to generate the return. These report files are initially installed automatically during the SIMS release upgrade.

Occasionally, additions or corrections are made to these files, after a SIMS release, which are required for the forthcoming return. The Import Fileset functionality is provided to enable these files to be imported into SIMS, by the Personnel Officer, Returns Manager or System Manager between the SIMS releases.

> **IMPORTANT NOTE:** *The report files are not always updated between releases. Therefore, it is not always necessary to use the Import Fileset routine. A newsfeed will be posted to the My Account website (https://myaccount.capita-cs.co.uk) (under **Notifications**), if updated files are available for import.*

If revised files are supplied, the fileset will be available as a ZIP file, which should be downloaded from My Account, unzipped and then imported into the SIMS Document Management Server (DMS) via **Tools | Setups | Import Fileset**. Ensure that the DMS is configured correctly before attempting to import the files.

TIP: To check which version of the fileset is currently in use, select Routines | Statutory Returns | <census name> to display the Census Return browser. The Validation Fileset ID is displayed in the header of the browser. For information about the latest available Fileset version, please check the applicable newsfeed on the My Account website (https://myaccount.capita-cs.co.uk).

Before Importing the Revised Files

To enable the file(s) to be imported successfully, ensure that the DMS is configured correctly. This is achieved via **Tools | Setups | Document Management Server**. Click the **Test server connection** button to check if the specified DMS is available for use and functioning correctly.

If the connection is unsuccessful, check the following details:

- The **Protocol** field defaults to **http** and should not be edited.
- The **Computer name** should be the name/number of the PC on which the DMS is installed.
- The **Port** number is usually 8080. The number must be between 0 and 65535.
- The **Active** check box must be selected, indicating that the server is in use.

Click the **Test server connection** button again. If the DMS is now working correctly, click the **Save** button.

Additional Resources:

Setting up and Administering SIMS handbook

Importing the Revised Files

1. If revised files are supplied, download the required ZIP file from the My Account website (https://myaccount.capita-cs.co.uk) to a folder of your choice.
2. Unzip the ZIP file to a folder of your choice.
3. In SIMS, select **Tools | Setups | Import Fileset** to display the **Import Fileset** page.

4. Click the **Browse** button to display the **Open** dialog.

5. Navigate to the location of the downloaded fileset. The file name is made up of the following data fields: `<Fileset Number>-StatutoryReturns-<Term and Year>_Fileset.mfs`.

> **IMPORTANT NOTE:** *If more than one MFS file is displayed in the **Open** dialog, care should be taken to select the correct file.*

6. Highlight the file then click the **Open** button. Alternatively, double-click the required MFS file to return to the **Import Fileset** page.

> *NOTE: The following graphics show example data only.*
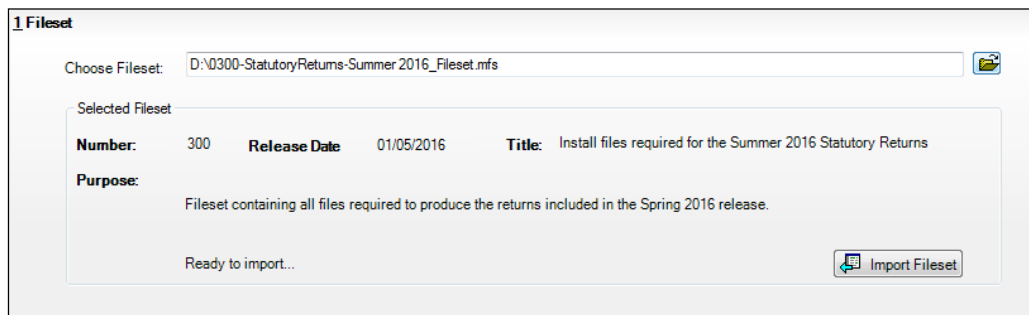
Details of the selected fileset are displayed, including the version **Number** of the fileset, the **Release Date** and the fileset description (**Title**).

7. Click the **Import Fileset** button to import the fileset into the DMS.

When the import process is finished, **Import successful** is displayed at the bottom left-hand side of the **Fileset** panel and you are advised to restart SIMS. This ensures that the newly imported data will take effect.
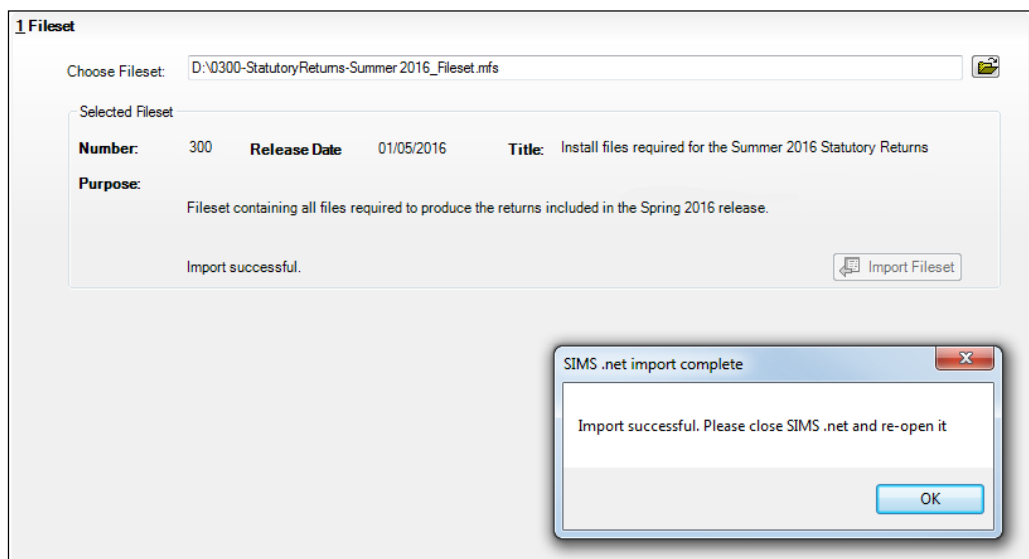
8. Click the **OK** button then restart SIMS.
9. Run the return in the usual way.

☐ **Completed**

School Census Return Process Flow

The following provides a brief outline of the steps involved in producing the School Census Summer 2016 Return. If data has been regularly and accurately maintained, many of the activities in this document are unnecessary. However, it is advisable to check to ensure that the information is up-to-date.

1. Upgrade to the SIMS 2016 Spring Release (7.168) or later.

2. Carry out one or more dry runs to identify any errors that may exist in your data.

3. Ensure that the relevant pupil and school data exists in SIMS and that it is complete and correct. Use the Bulk Update routine (**Routines | Pupil | Bulk Update**) to correct missing or invalid data, if required.

4. Complete the information on the **Census Return Details** page.

5. Create and validate the return.

6. Resolve any validation errors/queries and then create and validate the return again.

   Continue to resolve the validation failures then repeat the Create and Validate routine until you are satisfied that the content of the return is correct.

   The detail reports and Summary report can be generated to assess the accuracy and completeness of the return.

7. Provide the Head Teacher with the latest copy of the Summary report to enable them to check that all information is correct before they give approval for authorisation of the return.

   The Summary report can be used in conjunction with the detail reports.

8. Once approval has been given, authorise the return (**Routines | Statutory Returns | School Census** – **Authorise** button).

9. Upload the return to the DfE COLLECT data collection website or submit it to your Local Authority, as applicable.

```
        ╭────────────────────────────────╮
        │  Upgrade to the latest available │
        │       release of SIMS            │
        ╰────────────────────────────────╯
                      │
                      ▼
        ┌────────────────────────────────┐
        │ Configure the Census Folder and specify the │
        │    Security message for Reports.  │
        └────────────────────────────────┘
                      │
                      ▼
        ┌────────────────────────────────┐
        │ Ensure that school details and pupil/student │
        │   details are correct and up-to-date. │
        └────────────────────────────────┘
                      │
                      ▼
           ┌────────────────────┐
           │  Start a new return. │
           └────────────────────┘
                      │
                      ▼
           ┌────────────────────┐
           │  Calculate All Details │
           └────────────────────┘
                      │
                      ▼
        ┌────────────────────────────────┐
        │ Check all information displayed on the Census │
        │  Return Details page and edit, if required.  │
        └────────────────────────────────┘
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                      ▼
        ┌────────────────────────────────┐
        │   Create and validate the return. │
        └────────────────────────────────┘
                      │
                      ▼
              ┌──────────────┐
       ◄──────│ Any error or │──────►
       │      │   queries?   │       │
       ▼      └──────────────┘       ▼
   ┌───────┐                    ┌───────┐
   │  YES  │                    │  NO   │
   └───────┘                    └───────┘
```

YES branch:

Produce the Validation Errors Summary report to assist with the resolution of errors and queries.

↓

Produce the detail reports and the Summary report to assist with the resolution of errors and queries.

↓

Resolve errors and check queries.

NO branch:

Produce the Summary report then check the report content to ensure that the return is acceptable before authorising the return.

↓

Authorise the return.

Confirm that the Head Teacher is satisfied that the return file is ready for upload.
Enter additional text to be displayed on the authorisation report, if required.

On authorise, the Validation Errors Summary report, Summary report and Authorisation report are generated and displayed in your web browser. All reports (including the detail reports) can be viewed via the Retrieve Authorised Census Return Files routine.

↓

Submit the return.

*02|*Carrying out a Dry Run

Why Carry out a Dry Run?

When you have upgraded to the SIMS 2016 Spring Release (7.168), you can carry out one or more dry runs of the return.

The purpose of a dry run is to produce the Validation Errors Summary, which details the corrections that need to be made to your data to make it acceptable for inclusion in the return. To ensure that you are aware of potential issues, it is advisable to do this as early as possible, even if you know that your data has not yet been fully prepared or checked.

Whilst a significant number of errors may be generated, many of the errors that relate to pupils, e.g. language, can be fixed quickly using the Bulk Update routine (please see *Updating Information Using the Bulk Update Routine* on page *22*).

The Dry Run Process

1. Select **Routines | Statutory Returns | School Census** to display the **Census Return for Summer 2016 Term** browser.

2. Select an existing School **Census Folder** or enter a new location in which the School Census files will be stored. You may wish to make this a temporary folder for the purpose of producing a dry run.

> *IMPORTANT NOTE: Due to the sensitive nature of some of the data stored in SIMS, careful consideration should 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. The DfE recommends ISO27001 as the standard for information security (http://www.itgovernance.co.uk/iso27001.aspx). If you are in any doubt, you should consult with your IT Security Officer before proceeding.*

3. Click the **New** button to display the **Census Return Details** page.

4. By default, the return **Description** is displayed as **School Census Summer 2016**. Edit the **Description** to any name that will clearly distinguish this dry run from the actual return, which will be generated later, e.g. `Summer16Test`.

5. In the **Census Details** panel, click the **Calculate All Details** button to extract the required information from the SIMS database and display the results in the various panels of the **Census Return Details** page.

6. If there is any missing or invalid data, an error message is displayed on the Status Bar. This data must be added/corrected before you can create and validate the return.

7. Click the **Create & Validate** button to start the validation process. This may take some time. Any missing or invalid data is listed in the **Validation Errors Summary** panel, located at the bottom of the page.

Additional Resources:

Detailed information about completing the individual panels on the **Census Return Details** page is available in the *Producing the School Census Summer 2016 Return* handbook applicable to your school phase.

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 at the bottom of the **Census Return Details** page.

The number of errors and queries found during the Create and Validate process is displayed in the header of the **Validation Errors Summary** panel.

Details about each of the errors and queries found are displayed in the columns as described in the following table.

Column	Description
Type	Displays the type of validation rule: Failure (**F** displayed in red) indicates an error, which must be corrected. Query (**Q** displayed in black) indicates that there are unusual data conditions. These should be considered and corrected, if necessary.
Sequence	Shows the error or query number.
Message	Displays the text of the error or query message.
Location	Lists the specific record containing the error or query.
Solution	Provides a suggestion on how the error can be corrected or the query checked. Many solutions have a hyperlink (indicated by a **#**) to the appropriate area of SIMS.

To assist in the resolution of any errors and queries:

- When the mouse pointer is hovered over a **Message**, **Location** or **Solution** cell, hover help displays the entire content of that cell.

- When the mouse 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 issue can be checked.

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

Click the appropriate hyperlink to display the specific SIMS area where the record(s) can be checked or corrected.

- The Student Search functionality can be used to display all errors and queries relating to a particular pupil. Enter all or part of a UPN, pupil's surname or date of birth in the **Student Search** field then select the required record from the **Student Search** drop-down list to populate the **Student Search** field. Click the **Find** button to display the applicable validation records.

- Click a **Solution** hyperlink to display the area of SIMS where the associated issue can be checked and/or corrected. When you return to the **Validation Errors Summary** panel, the details of the applicable pupil are displayed in the **Student Search** field. Click the **Find** button to display all errors and queries relating to that pupil.

- 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, which is particularly useful if there are a large number of errors/queries, by clicking the **Report** button (located on the left-hand side and directly above the **Validation Errors Summary** panel). The report is displayed in your web browser, e.g. Windows® Internet Explorer®, from where it can be printed, or transferred to another application, if required.

  The report (Validation Errors Summary.HTML) is saved automatically in the **Census Folder**, which was specified previously in the **Census Return for <season> <year> Term** browser. The original report, which was generated when the **Create & Validate** button was clicked (e.g. <LACode><SchoolNumber>_<SurveyType>_<LACode><LL><Year>_ <SerialNumber>_ValidationErrorsSummary.HTML), is also stored in this folder.

For guidance on navigating to files on your local workstation when you are working in a <u>Hosted</u> 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 wish to hide the list of error and queries, click the **Close** button located at the top right-hand side of the **Validation Errors Summary** panel. The list is displayed again when the Create and Validate process is run.

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

In addition to the **Validation Errors Summary**, an Errors and Resolutions document containing a list of all errors/queries that can be generated is being produced. Explanations and information on how to resolve the errors or whether the queries can be ignored are also included. The document can help to identify the order in which errors should be corrected. For example, if a UPN is missing, several UPN related errors might be generated. Therefore, adding missing UPNs can remove several errors.

Producing Detail Reports

Detail reports can be used to check the data stored in SIMS that has been used to create the return.

The following reports are currently available:

On-Roll Basic Detail Report

Report Criteria: Pupils on-roll on census day.

This report provides information about all pupils who are on-roll on census day, e.g. UPN, full name, date of birth, gender, year taught in, date of admission, enrolment status, language, part-time status, boarder status, Hours at Setting and Funded Hours, etc.

Leavers Basic Details Report (not applicable to Nursery schools)

The report criterion varies depending on your school phase.

The Leavers Basic Details report provides information about pupils <u>not</u> on-roll on census day, e.g. UPN, former UPN, full name, date of birth, gender, date of admission, date of leaving, language, part-time status, boarder status, etc.

Exclusions Report (not applicable to Nursery schools)

Report Criteria: On-roll pupils and leavers with exclusions two terms ago (01/09/2015 to 31/12/2015). Not applicable to pupils who have exclusions with appeal result of **Reinstated** or **Not in the best interests of the child**.

This report provides the following details about pupils who match the report criteria: UPN, legal surname, legal forename, date of birth, gender, date of admission, exclusion category, reason for exclusion, exclusion start date, number of session excluded from, in care indicator, SEN provision and on-roll status.

Attendance Report (not applicable to Nursery and Special schools)

Report Criteria: Pupils with attendance one term ago (01/01/2016 to 27/03/2016). On-roll pupils and leavers (not boarders) aged four to 15 at 31/08/2015.

This report provides basic pupil information (i.e. UPN, legal surname, legal forename, date of birth, gender, year taught in and on-roll status) about the pupils who match the report criteria.

The number of termly sessions possible and the number of termly absence sessions are shown. The columns displayed on the right-hand side of the report shows termly attendance codes for authorised absence sessions and unauthorised absence sessions. Attendance not required sessions (Y) are also shown.

Absentees Report (not applicable to Nursery schools)

Report Criteria: Pupils who have missed 14 sessions and whose absence might need to be tracked. On-roll pupils and leavers (not boarders) with attendance one term ago (from 01/01/2016 to 27/03/2016) who were aged four to 15 at 31/08/2015.

The number of sessions possible and the number of authorised plus unauthorised absences applicable to each of the pupils are shown on this report.

The report also shows basic details, i.e. UPN, legal surname, legal forename, date of birth, gender, year taught in, on-roll status and enrolment status, about the pupils who match the report criteria.

SEN Report

Report Criteria: Pupils with SEN Provision/Status = **S** (Statement), **E** (Education), Health and Care Plan, **K** (SEN Support).

This report provides a list of pupils who have special educational needs. Displayed are their UPN, legal surname, legal forename, date of birth, gender, year taught in, SEN Provision and on-roll status.

Address Details Report

Report Criteria: Pupils on-roll on census day.

This report provides a list of pupils, their UPN, former UPN (if applicable), legal surname, legal forename, middle name(s), address and the administrative area/county.

School Dinner Taken Report (not applicable to Nursery schools)

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

- Pupils in Year Taught In R, 1 and 2.
- Pupils in year Taught In X who are aged four to six and who were born between 01/09/2008 and 31/08/2011 inclusive (Special schools only).

This report provides the following information about pupils who match the report criteria: UPN, legal surname, legal forename, date of birth, gender, year taught in and school dinner taken.

Free School Meal Eligibility Report

Report Criteria: On-roll pupils on census day who were eligible for free school meals on or after 22/01/2016 and up to and including census day (19/05/2016).

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

> *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 (not applicable to Nursery or Primary schools)

Report Criteria: On-roll pupils and leavers aged 16 plus at 31/08/2015 who have been awarded Vulnerable Group and/or Discretionary Bursary funding from 01/08/2015 to 19/05/2016.

This report provides information regarding the applicable pupils: UPN, legal surname, legal forename, date of birth, gender, year taught in, Learner Support and on-roll status.

Top-up Funding Report

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

The following information is displayed on the report: UPN, legal surname, legal forename, date of birth, gender, year taught in and SEN provision.

Adopted from Care Report

Report Criteria: On-roll pupils who have been adopted from care as at census day.

The report displays the following information about pupils who have been adopted from care: UPN, legal surname, legal forename, date of birth, gender, year taught in and adopted from care status, e.g. ceased to be looked after through a residence order (RO).

Generating Detail Reports

Selecting a Single Detail Report

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

The following example displays the reports available for Primary schools.

Selecting Multiple Detail Reports

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

2. If any reports are not required, deselect the associated check boxes.

3. Click the **Report** button to generate the selected reports, which are displayed in your web browser.

   The report(s) are saved automatically in the folder specified in the **Census Return for Summer Term** browser.

> *TIP: If required, the report can be transferred to a spreadsheet application, which enables the data to be sorted and the column order to be changed, etc. Right-click the report then select the required option, e.g.* **Export to Microsoft Excel***, from the drop-down list.*

☐ **Completed**

03| Preparing School Level Information

Checking Establishment Details

The following establishment details are required for the return and therefore need to be checked to ensure that they are recorded correctly in SIMS:

- **School Type**
- **School Governance**
- **Intake Type**.

The following read-only items are also collected. Please contact your Local Support Unit if the information displayed in SIMS is incorrect.

- **School Name**
- **LA** number
- **Establishment Number**
- **School Phase**
- **Curriculum Years** (highest and lowest national curriculum year group).

1. Select **Focus | School | School Details** to display the **School Details** page.

2. Check that the details displayed in the **Establishment** panel are correct.

3. Ensure that the **School Type**, **School Governance** and **Intake Type** are displayed correctly. Select the correct value from the drop-down lists, if required.

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

Information for Academies:

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

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

  Select **Academies** from the applicable drop-down lists.

- The school's **Previous Name** and **Date Name Changed**.

- The **Previous Estab Number** and **Date Number Changed** (both used by the School Census).

> *NOTE for Sponsor-led Academies where the DfE number has changed: If applicable, the date of arrival is reported as the date the DfE number changed and historical information from before this is <u>not</u> collected.*

- The **Previous URN Number** (used by other census returns) and **Date Number Changed**.

4. If you have edited the **Establishment** panel, click the **Save** button.

☐ **Completed**

Checking School Address, Telephone and Email Information

The following school contact details are collected for the return and therefore need to be checked to ensure that they are up-to-date and correctly recorded in SIMS:

- School **Email** Address
- School **Telephone** Number.

1. Select **Focus | School | School Details** to display the **School Details** page.

2. Click the **Contact Details** hyperlink to display the **Contact Details** panel.

3. Ensure that a **Telephone** number has been recorded (including the STD code).

4. Ensure that the school's official communications **Email** address has been recorded correctly (it must include the **@** character together with a minimum of one full stop).

   The email address must be the account used on a regular basis. It must also be accessible to the Head Teacher as it might be used for future DfE correspondence.

5. Click the **Save** button, if changes have been made.

☐ **Completed**

04 | **Preparing Pupil Level Information**

Checking Pupil Details

Before starting the School Census return, check that all on-roll pupils are recorded in SIMS and that as far as possible the information is up-to-date and accurate. Ensure that:

- new pupils have been added.

- any leavers have been recorded as such.

> *NOTE: Ensure that a pupil's first language and boarder status are entered before they are recorded as a leaver.*

- any duplicate or unwanted pupil records have been deleted.

- part-time details have been checked/updated.

- pupil details have been updated where required.

The following sections in this guide provide additional information and specific instructions on checking and editing pupil level data. Some of this data can be checked/updated using the Bulk Update routine (please see *Updating Information Using the Bulk Update Routine* on page *22*).

When you have upgraded to the SIMS 2016 Spring Release (7.168), you are strongly advised to carry out one or more dry runs in order to identify any validation errors and queries that must be resolved before the return is submitted (please see *Why Carry out a Dry Run?* on page *9*).

Updating Information Using the Bulk Update Routine

To prevent validation errors from occurring, it is advisable to check your SIMS data for accuracy before the return is created and validated.

Many items can be checked using the Bulk Update routine. This functionality enables you to search for missing or invalid data then update in bulk. For example, it is possible to search for all pupils who do not have a First Language recorded against their name. From the pupils found, a value can be assigned to all or several pupils. This prevents the need to enter/change values manually for individual pupils.

1. Select **Routines | Pupil | Bulk Update** to display the **Bulk update Pupil** browser.

2. In the **Bulk Update** panel, select the required **Group Type** and **Group** from the drop-down lists.

The **Group Type** indicates the type of group to list while the **Group** enables the specific group of pupils to be listed. For example, selecting a **Group Type** of **Year Group** enables a specific year to be selected from the **Group** drop-down list, such as **Year 8**.

If searching for missing information, select the particular data field from the **Group Type** drop-down list, such as **First Language**, and then select a specific **Group**, such as **<NONE>**.

It is also possible to use this functionality to review the data entered for all the pupils in the school. This is achieved by selecting **Year Group** from the **Group Type** drop-down list and **<ANY>** from the **Group** drop-down list and then selecting the required **Data Item**.

The following table provides some examples of the searches that can be carried out to identify missing data:

Group Type	Group	Data Item	Comment
First Language	<NONE>	First Language	Identifies pupils who do not have a First Language recorded. Can also be used to change existing values as required.
SEN Status	Statemented	SEN Provision Type	Lists pupils with a SEN Status of **S** enabling the SEN Provision to be selected.

Group Type	Group	Data Item	Comment
Year Group	Year 8 (and above)	Boarder Status	Searches for all pupils in Year Group 8 and then displays the boarder status recorded against each pupil's name.

3. Select the required **Data Item** from the drop-down list, e.g. **First Language**.

4. The **Effective Date** is the date on which the membership of the group is based and defaults to today's date. In most circumstances, it is advisable to change this date to the start of the academic year because most data recorded is applicable from the start of the academic year.

5. Click the **Search** button to display the **Members** panel, which displays a list of pupils matching the chosen criteria and the choice of **First Language** types.

> *TIPS: Use the horizontal and vertical scroll bars to view additional columns or rows as required. To increase the number of columns visible on the page, right-click any column heading then select **Narrow Columns** from the pop-up menu.*

Bulk Updating Data with the Same Data Item then Editing the Exceptions

Often, the most effective way of populating missing data is to fill all the rows with the same data item and then edit the exceptions (for example, depending on the ethnic range within your school).

The following example illustrates how to set the ethnicity of all pupils as **English** then edit the exceptions.

1. Right-click the **English** data entry column header (hover over the heading to see the full title, if required) then select **Check All** from the pop-up menu.

All the cells within that column are populated with ticks.

2. Edit the exceptions by clicking in the cell associated with the individual pupil and their status, e.g. the first language of Neel Abhra is Estonian.

1 Members										
Name	Year Group	Assigned	ha/Bhut ese	Ebira	Edo/Bini	Efik-Ibibio	English	Esan/Ishan	Estonian	Ewe
Aaron, Chris	3	English					✓			
Aaron, Liz	3	English					✓			
Aaron, Sophie	3	English					✓			
Abdullah, Tamwar	R	English					✓			
Abhra, Abjit	N2	English					✓			
Abhra, Alisha	N2	English					✓			
Abhra, Neel	N2	Estonian							✓	
Abraham, Jane	4	English					✓			
Ackton, Stan	N2	English					✓			
Ackton, Stephen	3	English					✓			
Acton, Jordan	5	English					✓			
Acton, Samantha	6	English					✓			
Adams, Adam	4	English					✓			
Adams, Laura	2	English					✓			
Adasheji, Mohammed	3	English					✓			
Adebayor, Emmanuel	5	English					✓			
Akeman, Rebecca	1	English					✓			
Americana, Kari	5	English					✓			
Amnar, Tarak	2	English					✓			
Amoso, Rosanna	6	English					✓			
Amoso, Silv	6	Italian					✓			
Arkell, Isis	1	English					✓			
Total 436		436	0	0	0	0	346	0	2	

3. Once you have made all the required changes, click the **Save** button to bulk update the records.

Bulk Updating Data for a Selection of Pupils

There are two methods for selecting a number of pupils.

Entering a Value for a Selection of Pupils

1. Highlight the first pupil you wish to select then hold down the **Ctrl** key and highlight the other required pupils.
2. Release the **Ctrl** key and then click one of the highlighted cells in the required data item column.

    A tick indicates that the pupil has been assigned that value.

Entering a Value for Sequentially Listed Pupils

This method can be used for assigning a value to a group of sequentially listed pupils. For example, clicking the **Assigned** column heading displays all unassigned pupil at the top of the list.

1. Highlight the first pupil in the group, hold down the **Shift** key then click the last pupil in the group (alternatively, hold down the **Shift** key and press the **Down Arrow** key).
2. Release the **Shift** key then click one of the highlighted cells in the required data item column.

    A tick indicates that the pupil has been assigned that value.

Recording Leavers and Re-Admissions

Ensure that all your leavers are taken off-roll and any returning pupils are re-admitted.

The accuracy of pupil numbers can be checked by running the Population Analysis (Dated) report (**Reports | Run Report – Focus – Student**). This is a predefined report that gives a breakdown of the number of pupils (including numbers by gender) for each registration group in each year, together with a grand total.

Recording a Leaver

Not applicable to Nursery schools

The **Date of Leaving** is collected for all schools with the exception of Nursery schools.

1. Select **Routines | Pupil | Leavers** to display the **Find Pupil(s)** (or **Student(s)**) browser.

2. Ensure that the **Status** of **On Roll** is selected.
3. Click the **Search** button to display a list of all on-roll pupils.

4. Highlight the pupil(s) you wish to record as leavers then click the **Select** button. The selected pupil(s) are displayed in the **Students** panel.

5. In the **Leaving Information** panel, enter the **Date of Leaving** or click the **Calendar** button and select the required date.

The date of leaving should be the date that the pupil is actually leaving the school, unless they are transferring from Junior/Primary phase to Secondary phase because Local Authorities normally specify the dates to be used for school transfers so that they match. For example, some authorities prefer not to have any gaps between dates and may suggest a date of leaving (the old school) of 4 September and the date of admission (into the new school) of 5 September. If you are in any doubt, please contact your Local Authority for advice.

6. Select the **Reason for Leaving** from the drop-down list, then either:
   - highlight the pupils to whom this information applies (using the **Ctrl** or **Shift** keys) and click the **Assign to Selected** button; or
   - if the information applies to all the pupils in the list, click the **Assign to All** button.

7. Optionally, enter the **Destination after Leaving** if known, then either:
   - highlight the pupils to whom this information applies (using the **Ctrl** or **Shift** keys) and click the **Assign to Selected** button; or
   - if the information applies to all the pupils in the list, click the **Assign to All** button.

8. To remove a pupil from the list, highlight their name then click the **Remove** button.

9. To clear the contents of the **Date of Leaving**, **Reason for leaving** and **Destination after Leaving** fields, highlight the required pupil(s) then click the **Clear** button. Re-enter the information as required.

10. Click the **Save** button.

☐ **Completed**

Re-Admitting a Pupil

Any pupil who leaves the school and subsequently decides to return must be re-admitted.

> *NOTES: Do not remove the leaving date, as the pupil's period of absence from the school will not be recorded.*
>
> *However, if a pupil is intending to leave but subsequently changes their mind and decides not to leave, the date of leaving can be removed, as continuous attendance has been maintained.*

1. Select **Focus | Pupil | Pupil Details** to display the **Find Student** browser.
2. Click the **New** button to display the **Add Student** page. It is necessary to enter limited information here as you know that the person already exists.
3. Click the **Continue** button to display a list of **Matched People**, based on the criteria entered on the **Add Pupil** page.
4. Highlight the required pupil then click the **Open** button. The following warning message is displayed:

   The selected student is a leaver. Do you want to re-admit the student?

5. Click the **Yes** button if you are certain that this is the pupil who should be re-admitted. Their details are displayed on the **Student Details** page.

6. Complete the mandatory fields (**Date of birth**, **Gender**, **Year Group**, **Enrolment Status**, **Year Taught In** and **Admission Date**) and check any other details that may have changed since they were last on-roll, such as their address.

7. Check that the original **UPN** is displayed.

   If it did not previously exist, generate a new **UPN** by clicking the button adjacent to the **UPN** field to display the **Issue UPN** dialog.

   Select either the **Issue Permanent** or **Issue Temporary UPN** radio button then click the **OK** button to return to the **Registration** panel.

   The temporary/permanent UPN is issued on save.

8. Click the **Save** button to re-admit the pupil.

> *NOTE: If the pupil's registration status has changed from when they were previously on-roll, their enrolment status should be changed via **Routines | Pupil | Change Enrolment Status**.*

☐ **Completed**

Deleting Unwanted Pupil Records

If there are pupils who have been entered in error (such as duplicates), ensure that they are deleted so that they are not included in the return. This is achieved via **Routines | Pupil | Delete Pupil**. After selecting the required pupil, you have the opportunity to review and print their information before deleting their record permanently.

> **WARNING:** *The deletion is irreversible; therefore a pupil's record must only be deleted if they have been entered in error.*

☐ **Completed**

Checking a Pupil's Basic Details

Ensure that basic details for all pupils are correct. It may be necessary to make changes for a number of reasons, e.g. to correct inaccurately entered information, legal adoption, change of legal surname, etc.

The following information is collected in the return:

- **Legal Forename** (mandatory information in SIMS)
- **Middle Names**
- **Legal Surname** (mandatory information in SIMS)
- **Former Surname**
- **Preferred Surname** (mandatory information in SIMS)
- **Gender** (mandatory information in SIMS)

- **Date of Birth** (mandatory information in SIMS).

1. Select **Focus | Pupil | Pupil Details** to display the **Find Pupil** browser.

2. Search for then double-click the name of the required pupil to display the **Pupil Details** page.

3. Check that all the details displayed in the **Basic Details** panel are up-to-date and accurate, paying particular attention to the data collected in the return (listed previously).

   If a legal change (rather than a correction) is made to the **Legal Forename**, **Middle Name(s)** or **Legal Surname**, a **Reason** and **Date of Change** must be recorded.

4. If you have made any changes, click the **Save** button.

☐ **Completed**

Recording a Pupil's Change of Surname

It is a requirement of the return that a history of pupils' previous surname(s) is recorded.

1. In the **Basic Details** panel, edit the pupil's **Legal Surname**.

2. Click the **Save** button. The following message is displayed:

   Is this a correction to the name or a legal change to the student's name? If it is a legal change, please select Yes.

3. Click the **Yes** button to display the **Reason For Change** dialog.

4. Select the applicable **Reason** for change from the drop-down list. This entry is optional but is recommended to maintain a complete history of name changes.

5. The **Date of Change** defaults to today's date but can be amended by clicking the **Calendar** button and selecting an alternative date, if required.

6. Click the **OK** button to return to the **Basic Details** panel.

7. Click the **Save** button.

8. To view a list of the pupil's previous names, click the **History** button to display the **Previous Names for** dialog.
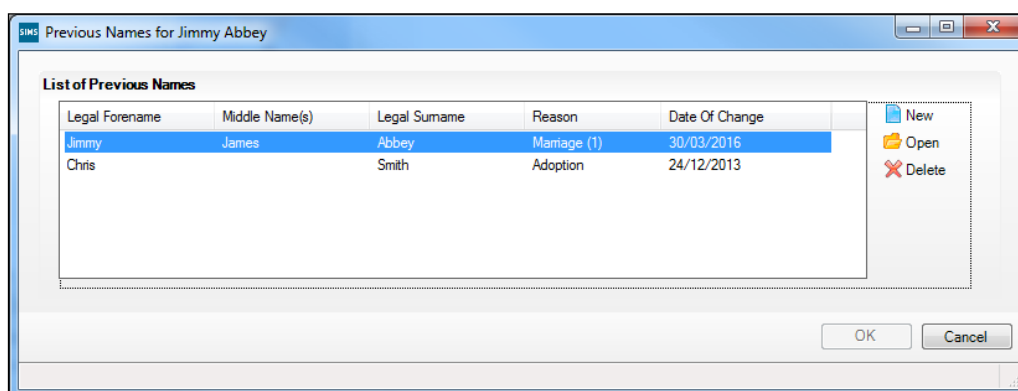
9. Click the **Cancel** button to return to the **Basic Details** panel.

☐ **Completed**

Checking Registration Details

The following registration information is collected in the return and should therefore be checked and corrected, if necessary:

- **Enrolment Status** (mandatory information in SIMS)
- **Admission Date** (mandatory information in SIMS)
- **Year Taught In**, i.e. National Curriculum Year Group (mandatory information in SIMS)
- **Boarder Status**
- **UPN**
- **Former UPN** (this is a read-only field, which is populated automatically if the UPN is changed)
- Part-Time Indicator.

Checking Unique Pupil Numbers

Ensure that all pupils have a UPN recorded and that all UPNs are in the correct format. A temporary UPN is acceptable in some circumstances.

1. Select **Focus | Pupil | Pupil Details** to display the **Find Pupil** browser.
2. Search for then double-click the name of the required pupil to display the **Pupil Details** page.
3. Click the **Registration** hyperlink to display the **Registration** panel.

> *NOTE: **The Early Years Attendance Patterns** section of the **Registration** panel is visible to Primary schools only.*

A unique UPN should be entered in the **UPN** field. If the UPN entered has an invalid format, the field turns red indicating that the UPN is incorrect and should be re-entered.

- **Permanent UPNs** are issued to a new pupil only when it is believed that they have never previously been allocated a UPN or to replace a temporary UPN.
- **Temporary UPNs** are issued to a pupil when the permanent UPN is not known to the school, e.g. awaiting transfer file/applicant's information. A temporary UPN can be recognised by the letter after the UPN number, e.g. H82020010701**A**.

4. If necessary, issue a new UPN by clicking the **Generate UPN** button adjacent to the **UPN** field to display the **Issue UPN** dialog.

 Generate UPN button
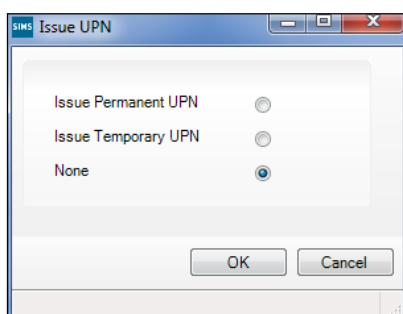
5. Select either the **Issue Permanent UPN** or **Issue Temporary UPN** radio button.
6. Click the **OK** button to return to the **Registration** panel.
7. Click the **Save** button to save any changes. The UPN is generated automatically when the record is saved.

> *NOTE: A pupil who is adopted after being allocated a UPN is often issued with a new permanent UPN. However, the exact process may vary depending on the circumstances and the guidance issued by your LA/DfE.*
>
> *For information about issuing a new UPN for an adopted child, please seek advice from your LA, if applicable.*
>
> *DfE guidance is also available on the GOV.UK website (https://www.gov.uk/government/publications/unique-pupil-numbers).*

☐ **Completed**

Checking Unique Learner Numbers

Applicable to Secondary/middle deemed Secondary, All-Through, Special schools and Pupil Referral Units

A Unique Learner Number (ULN) is a 10-digit identifier that is retained and stays with the pupil's learning record throughout their lives. Currently, this applies to pupils over the age of 14 involved in UK education or training.

Learning Records Service (previously known as the Managing Information Across Partners Programme) issues and maintains a ULN record for applicable pupils. ULNs can be obtained in one or more of the following ways:

- The DfE ULN service to upload a CTF file via a web page on the **S2S** website (http://www.education.gov.uk/researchandstatistics/datatdatam/s2s/a0064650/school-to-school-s2s).
- The Learner Registration Service Web Portal to obtain individual ULNs (https://www.gov.uk/government/collections/learning-records-service).

- The **Key to Success** website
  (https://www.keytosuccess.education.gov.uk/).

If available, enter a ULN for each pupil over the age of 14.

1. Select **Focus | Pupil | Pupil Details** to display the **Find Pupil** browser.
2. Search for then double-click the name of the required pupil to display the **Pupil Details** page.
3. Click the **Registration** hyperlink to display the **Registration** panel.

4. Check the content of the **Unique Learner Number** field. Enter the 10-digit identifier, if not currently displayed.
5. Click the **Save** button to save any changes, if applicable.

☐ **Completed**

Checking/Correcting Part-Time Pupil Information

The collection of part-time details is mainly relevant to Nursery schools (or schools with nursery age children) and Primary schools with Reception years. However, any pupil can be marked as part-time if their attendance is anything less than 10 sessions per week.

For dual registered pupils, time in other schools should be taken into account. For example, three full days in one school and two full days in another school should <u>not</u> be classified by either school as part-time.

When recording part-time details, a minimum of a **Start Date** needs to be entered in the **Part Time Details** section.

1. Select **Focus | Pupil | Pupil Details** to display the **Find Pupil** browser.
2. Search for then double-click the name of the required pupil to display the **Pupil Details** page.

3. Click the **Registration** hyperlink to display the **Registration** panel.

NOTE: The **Early Years Attendance Patterns** section of the **Registration** panel is visible to Primary schools only. If applicable, Primary schools should complete the **Early Years Attendance Patterns**, as this will help when updating Hours at Setting.

4. Check the details in the **Part Time Details** section. A minimum of a **Start Date** must be displayed.

5. Part-time details can be added by clicking the **New** button to display the **Add Part-time Attendance** dialog.

6. Enter a minimum of the **Start Date** then click the **OK** button to return to the **Registration** panel.

7. Click the **Save** button to save any changes.

IMPORTANT NOTE: It is equally important to edit the details of any pupils who are no longer part-time. This is achieved by highlighting the pupil's **Part Time Details** record then clicking the **Open** button to display the **Add Part-time Attendance** dialog. Enter the correct **End Date** then click the **OK** button to return to the **Registration** panel.

☐ **Completed**

Checking National Curriculum Year Groups

The National Curriculum Year Group (Year Taught In) is the year group in which the pupil is <u>taught</u> for the majority of the time, regardless of their chronological age. In most cases, this will be the same as the Year Group. However, some children are taught in the year above or below the expected year (based on their age), perhaps because they are academically advanced or behind. It is very important that the correct **Year Taught In** has been recorded in SIMS.

For the School Census Summer 2016 Return, the collection of data uses the Age at Date as at 31/08/2015.

The following table shows the Curriculum Year that pupils in England are expected to be taught in, according to their date of birth (during the academic year 2015/2016).

Curriculum Year the Pupil would Normally be Taught in	Date of Birth Range	Age Range
	After 31/08/2013	1 and under
N1	01/09/2012 to 31/08/2013	2 – 3
N2	01/09/2011 to 31/08/2012	3 – 4
R	01/09/2010 to 31/08/2011	4 – 5
1	01/09/2009 to 31/08/2010	5 – 6
2	01/09/2008 to 31/08/2009	6 – 7
3	01/09/2007 to 31/08/2008	7 – 8
4	01/09/2006 to 31/08/2007	8 – 9
5	01/09/2005 to 31/08/2006	9 – 10
6	01/09/2004 to 31/08/2005	10 – 11
7	01/09/2003 to 31/08/2004	11 – 12
8	01/09/2002 to 31/08/2003	12 – 13
9	01/09/2001 to 31/08/2002	13 – 14
10	01/09/2000 to 31/08/2001	14 – 15
11	01/09/1999 to 31/08/2000	15 – 16
12	01/09/1998 to 31/08/1999	16 – 17
13	01/09/1997 to 31/08/1998	17 – 18
	Before 31/08/1997	19+

There are three ways to check a pupil's curriculum year and date of birth in SIMS:

- Via individual pupil records (**Focus | Pupil | Pupil Details**).
- Via the pastoral structure by curriculum year (**Focus | School | Pastoral Structure | Current Structure**).
- Via the pastoral structure for the whole school (**Focus | School | Pastoral Structure | Current Structure**).

Additional Resources:

Managing Pupil/Students handbook
Setting up and Administering SIMS handbook

Checking the Pupil's Year Taught In Record

1. Select **Focus | Pupil | Pupil Details** to display the **Find Pupil** browser.
2. Search for then double-click the name of the required pupil to display the **Pupil Details** page.
3. Click the **Registration** hyperlink to display the **Registration** panel.

NOTE: **The Early Years Attendance Patterns** section of the **Registration** panel is visible to Primary schools only.

4. Ensure that the **Year Taught In** field displays the actual National Curriculum year in which the pupil is taught the majority of the time. If necessary, select the correct year from the drop-down list.

NOTE: Any change made in the **Registration** panel is effective from today's date. If the **Year Taught In** change was applicable from an earlier date, click the **History** button and apply the change from the actual date the change is required.

Checking the Year Taught In via the Pastoral Structure by Curriculum Year

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

2. Click the **Go** button.
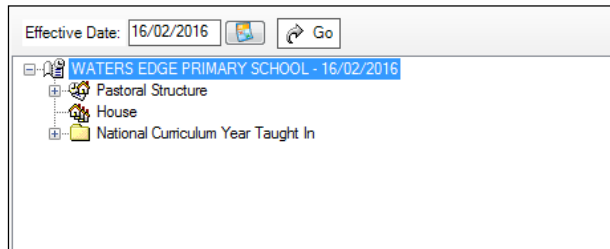
3. Expand the **National Curriculum Year Taught In** folder by clicking the **+** icon or double-clicking the folder name. The curriculum years are displayed beneath.
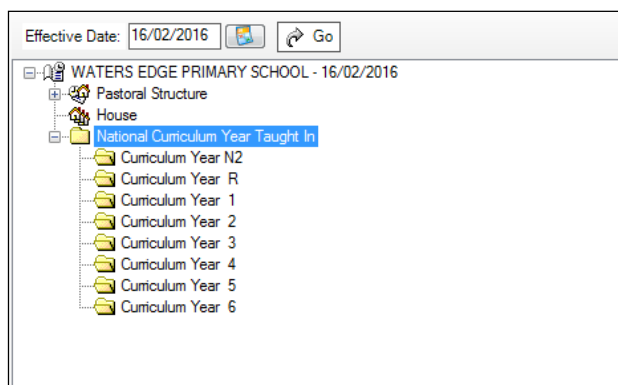
4. Right-click the required curriculum year folder and then select **Members** from the pop-up menu.

The **Allocate Pupils/Applicants** dialog is displayed.

5. Ensure that the **Effective Date Range** is changed to **Over the whole academic year** by selecting the applicable radio button.

6. To change a pupil's memberships of the **National Curriculum Year Taught In**, click the applicable cell in the grid.

   By default, the records are displayed in alphabetical surname order. To sort the pupil names in date of birth order, right-click the **DOB** column heading then select **Sort By** from the pop-up menu.

   The following graphic shows that one pupil is taught in Year **3**.

7. Ensure that <u>all</u> pupils are allocated membership to the correct **National Curriculum Year Taught In** and then click the **OK** button to return to the **Current Academic Year Pastoral Structure** page.

8. Repeat for the other curriculum years, where applicable.

9. Click the **Save** button.

Checking the Year Taught In via the Pastoral Structure for the Whole School

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

2. Click the **Go** button.
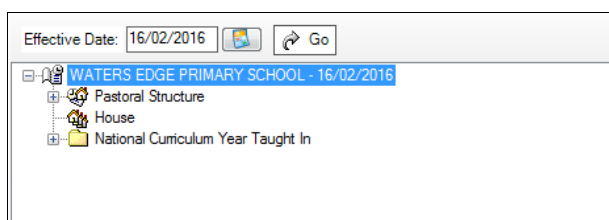
3. Right-click the **National Curriculum Year Taught In** folder and then select **Members** from the pop-up menu.

The **Allocate Pupils/Applicants** dialog is displayed.

4. Ensure that the **Effective Date Range** is changed to **Over the whole academic year** by selecting the applicable radio button.

   By default, the records are displayed in alphabetical surname order. Sorting the names in year group order assists in locating pupils who do not have a **Year Taught In** selected.

5. Right-click the **Year Group** heading then select **Sort By** from the pop-up menu. Any pupils who have not been allocated a year taught in are displayed at the top of the list.

> *TIP: To sort the pupil names in date of birth order, right-click the **DOB** column heading then select **Sort By** from the pop-up menu.*

6. Indicate which year the pupils with missing data are taught in by clicking the appropriate cell in the grid.

7. Ensure that all pupils have been allocated a year taught in and then click the **OK** button to return to the **Current Academic Year Pastoral Structure** page.

8. Click the **Save** button.

☐ **Completed**

Checking Home Address Information

A pupil's current home address is required for the return. Where a pupil has multiple current addresses, details of all addresses should be recorded.

All aspects of the address(es) are collected and therefore all address details should be recorded in order to avoid validation errors. It is particularly important to check that a **House Name** or **House Number** and a **Post Code** are entered in the correct fields.

Post codes must be entered in the correct format. A validation error is generated if a post code has not been entered (although it is understood that in some instances, such as Traveller children, a post code is not available).

1. Select **Focus | Pupil | Pupil Details** to display the **Find Pupil** browser.
2. Search for then double-click the name of the required pupil to display the **Pupil Details** page.
3. Click the **Addresses** hyperlink to display the **Addresses** panel.

4. Check that the **Post Code** and **House Number/Name** exist and that they are valid. If you have Windows® Internet Explorer®, these details can be checked by clicking the **Address** button to display the address location on a map.

> *NOTE: British Forces Post Office numbers can be added as post codes.*

5. If you have edited the address, click the **Save** button.
6. If the pupil has an additional current address, i.e. a **Second Home**, enter the additional address then click the **Continue** button (adjacent to the address) to display the **New Address Details** panel.
7. Enter the remaining address details and the **Address Type** then click the **Save** button to refresh the display.

☐ **Completed**

Checking Free School Meals Eligibility

Only pupils who have been approved by the LA to receive a free school meal should be recorded in SIMS as being eligible. It is advisable to check that all eligible pupils are recorded.

> *NOTE for schools with Reception, Year 1 and Year 2:*
>
> *All pupils in Reception, Year 1 and Year 2 are offered a meal regardless of whether they are eligible for free school meals.*
>
> *Pupils in Reception, Year 1 and Year 2 must only be recorded as eligible for a free school meal if they meet the criteria for free school meals.*

The following free school meal eligibility related data is collected in for the return:

- **Start Date**
- **End Date** (if known)
- UK **Country** in which the eligibility applies.

Meal Patterns are not required for the return but can be recorded for information purposes only. It is perfectly acceptable, for example, for a pupil to be eligible for free school meals, but to bring sandwiches (**PL** (packed lunch)) or to go home (**HO** (home)).

1. Select **Focus | Pupil | Pupil Details** to display the **Find Pupil** browser.
2. Search for then double-click the required pupil to display the **Pupil Details** page.
3. Click the **Dietary** hyperlink to display the **Dietary** panel.

4. Ensure the minimum of a **Start Date** and **Country** are displayed in the **Eligible for Free Meals** panel. If you need to edit the data, highlight the required record then click the **Open** button.

If a new record is required, click the adjacent **New** button to display the **Add Student Free Meals Details** dialog.

5. Enter the **Start Date** (and **End Date** if available) for the free meal period, as supplied by your Local Authority.

6. Ensure that the UK **Country** in which the eligibility applies is correct. Select from the drop-down list, if required.

7. Notes can be entered, if required.

8. Click the **OK** button to return to the **Dietary** panel, where the new information is displayed.

9. Click the **Save** button.

   Ensure that this information is checked/amended on a regular basis.

☐ **Completed**

Checking Ethnic and Cultural Information

Not applicable to Nursery schools

The following ethnic and cultural information is collected in the return:

First Language

▪ A First Language other than English should be recorded where a pupil was exposed to the language during early development and continues to be exposed to this language at home or in the community.

▪ If the child was exposed to more than one language (which may include English) during early development, the language other than English should be recorded, irrespective of the pupil's proficiency in English.

1. Select **Focus | Pupil | Pupil Details** to display the **Find Pupil** browser.

2. Search for then double-click the required pupil to display the **Pupil Details** page.

3. Click the **Ethnic/Cultural** hyperlink to display the **Ethnic/Cultural** panel.

4. Select the pupil's **First Language** from the drop-down list.
5. Click the **Save** button.

> *TIP: Now that home language is no longer collected in the School Census, users with School Administrator permissions can remove the **Home Language** field from the **Student Details** and **Application** pages, if required. This can be achieved by selecting the **Hide Home Language** check box in the **School Options** panel via **Tools | Setups | School Options**.*
>
> *Home language is always included in CTF imports, CTF exports and the Reporting Dictionary, even if it is <u>not</u> displayed on the **Student Details** and **Application** pages.*

☐ **Completed**

Checking Additional Information

Ensure that the following additional information is recorded in SIMS:

- **Youth Support Services Agreement** (YSSA) status (not applicable to Nursery or Primary schools)

  The YSSA replaces Connexions. It applies to pupils between age 12 and 25 with special educational needs and pupils between age 12 and 20 with no special educational needs.

- **Learner Support Code**, e.g. Post 16 Bursary of Vulnerable Group Bursary Awarded, Discretionary Bursary Awarded, etc. for 16 to 19 year olds (applicable to All-Through schools, Special schools and Pupil Referral Units)

The Bulk Update routine can be used to assign and edit these values for a specific selection of pupils at the same time, if required (please see *Updating Information Using the Bulk Update Routine* on page *22*).

1. Select **Focus | Pupil | Pupil Details** to display the **Find Pupil** browser.
2. Search for then double-click the required pupil to display the **Pupil Details** page.

3. Click the **Additional Information** hyperlink to display the **Additional Information** panel.

NOTE: The **Meals** section will be removed in a future release because the meal information is now entered via the **Dietary** panel.

4. Select the applicable **Youth Support Services Agreement** (YSSA) status from the drop-down list. YSSA has replaced Connexions Assent.

5. Ensure that the **Pupil Premium Indicator for year 2015/2016** check box is selected, if applicable. To enter a note related to the applicable year, click the **Search** button adjacent to the **Notes** field.

   Although Pupil Premium information is not collected for the return, it is important for schools that are in receipt of this funding, which is allocated to children from low-income families, to be able to give a full account of its use. The national school performance tables now include information about the progress of pupils in receipt of Pupil Premium and information is required to be sent to parents about how it has been used and what impact it has had on pupil progress.

6. Check that the **Learner Support** details are correct.

   Adding a new Learner Support record:

   a. Click the **New** button to display the **Student Learner Support Code Details** dialog.

   b. Select the applicable **Learner Support Code** from the drop-down list.

   c. Enter an **Award Date** or click the **Calendar** button then select the required date. **Notes** can be entered, if required.

   Updating an existing Learner Support record:

   a. Highlight the required record then click the **Open** button **Student Learner Support Code Details** dialog.

   b. Amend the **Learner Support** details, as required.

☐ **Completed**

Checking Special Educational Needs Information

The following Special Educational Needs (SEN) items are collected in the return:

SEN **Status** (SEN Provision)

- **E** – **Education, Health and Care Plan** (EHCP) – the LA has reviewed the pupil and a plan has been issued.
- **N** – **No Special Educational Ne**ed - No special educational need has been identified.
- **K** – **SEN Support** – actions have been put in place or will be put in place to support the pupil with their need, once a SEN need or potential SEN need has been identified.
- **S** – **Statement** – the LA has reviewed the pupil and a statement has been issued.

> *IMPORTANT NOTE: SEN Provisions/Statuses A and P are no longer valid.*

1. Select **Focus | Pupil | Special Educational Needs** to display the **Find SEN Student** browser.

2. Select the required **SEN Status** from the drop-down list. Additional search criteria can be selected, if required, e.g. **Year Group**.

3. Click the **Search** button to display a list of pupils who match the criteria.

4. Double-click the name of the required pupil to display the **Student SEN details** page.

5. Click the **Basic SEN Details** hyperlink to display the **Basic SEN Details** panel.

6. Ensure that the SEN **Status** and **Start Date** are correct.

    To amend an error in the current **Status** or **Start Date**, click the **Edit** button. Select the required **Status** from the drop-down list and edit the **Start Date**, if required.

    Alternatively, click the **New** button. This removes the original **Status** and the **Start Date** defaults to today's date. Select the applicable **Status** and change the **Start Date**, if required.

    > *NOTE: At least one Special Educational Need, e.g. **Visual Impairment**, must be recorded for all pupils with a SEN Status of **E – Education, Health and Care Plan (EHCP)**, **K – SEN Support** and **S - Statement**.*

    To view changes that have taken place to the pupil's SEN Status, click the **Status History** button to display the **Status History** page.

7. Update the other information on the **Student SEN details** page, if required and then click the **Save** button.

    The DfE website (http://www.gov.uk/schools-colleges/special-educational-needs) provides more information about Special Educational Needs, if required.

    ☐ **Completed**

Preparing Exclusions Information

Not applicable to Nursery schools

Exclusions information is required for pupils who were subject to any exclusion with a start date during the period 01/09/2015 to 31/12/2015 inclusive. Exclusions should <u>not</u> be counted if the Head Teacher withdrew them, or if the pupil was re-instated by the Discipline Committee or an independent Appeal Panel.

The following exclusion related data items are collected for the return:

- Exclusion **Type** (category, e.g. fixed period, lunchtime or permanent).
- Exclusion **Reason** (select one code to provide the main reason).
- Exclusion **Start Date**.
- Actual number of sessions (**Length**) - required for fixed period and lunchtime exclusions.
- SEN Provision (please see *Checking Special Educational Needs Information* on page *46*).
- In Care indicator (please see *Checking In Care Details for Excluded Pupils* on page *51*).

---

*NOTE: The **Start Date**, **End Date** (if known) and **LA Details** must be entered for any type of exclusion recorded for any pupils in care.*

IMPORTANT NOTE about Permanent Exclusions: Any permanently excluded pupils should be marked as leavers as soon as the exclusion has been confirmed by the LA. <u>Before</u> making them a leaver, ensure that you have recorded the following information:

- *In Care indicator (if applicable)*
- *SEN Status (if applicable – note that **Never Assigned** is not an acceptable value for excluded pupils)*
- *Ethnicity*
- *Ethnic Source*
- *Part-time indicator (if applicable)*
- *Date of Admission.*

Recording an Exclusion

1. Select **Focus | Pupil | Exclusions** to display the **Find Exclusions Student** browser.

2. Search for then double-click the required pupil to display the **Exclusion Details** page.

3. Click the **New** button adjacent to the **Exclusions** panel to display the **Add Exclusion** dialog.

4. Select the exclusion **Type** and the **Reason** for the exclusion from the respective drop-down lists.
5. Enter the exclusion **Start Date** and **End Date** or click the appropriate **Calendar** button then select the required date.
6. Select a **Start Time** and **End Time** (i.e. **AM** or **PM**) from the associated drop-down list.

7. Click the **Calculate** button to populate the **Length School Days** field automatically.

8. Click the **OK** button to save the exclusion details and return to the **Exclusion Details** page, where a summary of the new exclusion is displayed.

The Academic Year and the total number of exclusion days in that year are displayed at the bottom of the page.

9. Click the **Save** button to save the exclusion.

For more information about exclusions, please refer to the DfE website (http://www.education.gov.uk/schools/pupilsupport/behaviour/exclusion).

☐ **Completed**

Checking In Care Details for Excluded Pupils

Not applicable to Nursery schools

In care details are collected for pupils who were subject to any exclusion with a start date during the period 01/09/2015 to 31/12/2015 inclusive.

Any pupil in care (looked after children) should be recorded as such in SIMS. A child is considered 'In Care' or 'Looked After' if he or she is in the care of the Local Authority or is provided with accommodation for more than 24 hours by the authority. Please consult the person at school with the designated authority for in care children, e.g. the SEN Co-ordinator, if you are unsure.

Minimum details are required to set up an in care record, i.e. the **Care Authority** and a **Start Date**.

Adding a New In Care Record

1. Select **Focus | Pupil | Pupil Details** to display the **Find Pupil** browser.
2. Search for then double-click the required pupil to display the **Pupil Details** page.
3. Click the **Welfare** hyperlink to display the **Welfare** panel.

4. Click the **New** button adjacent to the **In Care Details** panel to display the **Add In Care Details** dialog.

5. Click the **Care Authority** browser button to display the **Select Local Authority** dialog.

6. Search for the required **Care Authority** by entering all or part of the name in the **LA name** field then click the **Search** button.

7. Double-click the **Name** of the required authority to return to the **Add In Care Details** dialog.

8. Enter the **Start Date** (and **End Date** if known) for the in care period.

> *NOTE: If the pupil was imported via CTF, the in care details **Start Date** defaults to the date the CTF was imported. If the actual in care **Start Date** is different, it should be manually amended to the correct date or date of admission. There is also an **Effective Date** button so, for instance, if the file is imported on the 10th of the month but the effective date is set to the 1st, the memberships will start on the 1st.*

Enter additional information, if required, e.g. **Personal Education Plans** (PEP). Although PEP details are not collected in the return, the plan ensures that access to services and adequate support are available for the child whilst also ensuring that stability is maintained and disruption to the child's schooling is kept to a minimum.

9. Click the **OK** button to return to the **Welfare** panel.

10. The **In Care** status is displayed as **Currently In Care** and a summary is displayed in the **In Care Details** section.

☐ **Completed**

Preparing Attendance Information

Not applicable to Nursery or Special schools

Termly attendance data (including attendance codes and the number of sessions missed) should be provided for non-boarder pupils and leavers aged four to 15 inclusive on 31/08/2015, who were on-roll for at least one session during the collection period from 01/01/2016 to 27/03/2016.

The attendance data collected in this return includes:

- Attendance Codes (i.e. the reasons for absence)
- Number of Sessions Missed.

If you use SIMS Attendance or SIMS Lesson Monitor, attendance data is entered in the return automatically, provided that there are no missing marks.

> **IMPORTANT NOTE:** *If you use SIMS Attendance or SIMS Lesson Monitor, ensure that all missing marks and unexplained absences for the previous term have been dealt with before commencing the School Census Return.*

If you do not use SIMS Attendance or SIMS Lesson Monitor and you do not use a software package that writes back to the SIMS database, or if you have not converted to the code of practice for attendance codes, you need to calculate and enter the following information manually on the **Census Details** page (via **Routines | Statutory Returns | School Census**):

- Possible Sessions
- Sessions Missed due to Authorised Absence
- Sessions Missed due to Unauthorised Absence.

For information and advice about school attendance, please refer to the DfE website (http://www.education.gov.uk/schools/pupilsupport/behaviour/attendance).

Additional Resources:

Producing the School Census Summer 2016 Return handbook
Managing Pupil/Student Attendance handbook (SIMS Attendance users)
Monitoring Session and Lesson Attendance handbook (SIMS Lesson Monitor users)

☐ **Completed**

Recording Universal Infant School Meals

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

> *NOTE for Special schools: The School Dinner Taken routine is applicable to Special schools that have on-roll pupils who have taken a school dinner on census day and who are in Year Taught In Reception, Year 1 or Year 2 and those in Year Taught In X aged four to six who were born between 01/09/2008 and 31/08/2011.*

All pupils in Reception, Year 1 and Year 2 in English state-funded schools are offered a Universal Infant School Meal, i.e. a hot meal at lunchtime. This applies to Academies, Free Schools and Pupil Referral Units, as well as to schools maintained by the Local Authority. The School Census Summer 2016 Return collects information about pupils who receive a Universal Infant School Meal (school dinner) on census day.

School dinners taken on the **Reference Date** (by default, census day) can be calculated from the information stored in Dinner Money. Dinner Money users should therefore ensure that school dinners taken are recorded correctly via **Focus | Attendance | Take Register** or **Focus | Dinner Money | Record Pupil Meals**.

- If default meal patterns have been entered (via **Focus | Dinner Money | Pupil Default Meal Patterns**), the Dinner Register is populated automatically with the default meals.

  For more information about setting up default meal patterns, please refer to the *Setting up and Maintaining Dinner Money* handbook.

- Where any 'pupil not present' attendance marks have been entered, the Dinner Register is populated automatically with an absent mark.

- Any special meals entered in advance are displayed and are not overwritten by the default meal pattern.

The attendance data recorded for census day morning can be used to calculate all pupils who are present and are likely to be taking a school dinner. Therefore, when completing the School Census **School Dinner Taken** panel, the calculated numbers must be edited to reflect hot meals provided by the school only. Ensure that the pupils listed on the Reception, Year 1 and Year 2 attendance registers are accurate and that the registers are taken on census day morning (before completing the School Census **School Dinner Taken** panel).

Updating Class Types

Applicable to Primary schools only

Before starting the return, it is necessary to indicate which classes a pupil is a member of – either **Nursery** (if the pupil is currently in a LA designated Nursery Unit) or **Other** (any other class). This is only needed for newly added pupils where they have transferred from a LA designated Nursery Unit into an 'Other' class.

The values displayed on the **Update Class Type** page default to those of the previous return. Existing details should be checked and edited, if necessary, and the details of any new pupils added.

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

1. Select **Tools | Statutory Return Tools | Update Class Type** to display the **Update Class Type** page.

Update Class Type

Save | Undo

Census
Term: Summer 2016

Pupils View
YTI: All   Reg: All   Status: All

Pupils

Name	Date of Birth	Gender	AdNo.	YTI	Reg	Nursery	Other
Aaron, Chris	01/09/2005	Male	001102	5	5DT		✔
Aaron, Liz	01/09/2005	Female	001103	5	5DT		✔
Aaron, Sophie	01/09/2005	Female	001104	5	5BB		✔
Abdullah, Tamwar	12/01/2008	Male	001275	2	2JB		✔
Abhra, Abjit	20/11/2009	Male	001336	1	ELM		✔
Abhra, Alisha	20/10/2011	Female	001337	N2	PM	✔	
Abhra, Neel	20/11/2011	Male	001338	N2	PM	✔	
Abraham, Jane	19/05/2005	Female	001041	6	6KH		✔
Ackton, Stan	22/03/2011	Male	001339	N2	PM	✔	
Ackton, Stephen	12/03/2006	Male	001175	5	5BB		✔
Adams, Adam	31/08/2005	Male	001122	6	6VC		✔
Adams, Laura	03/03/2007	Female	001235	4	4ES		✔
Adams, Nancy	18/12/2011	Female	001460	N2	PM	✔	✔
Adasheji, Mohammed	02/02/2006	Male	001176	5	5DT		✔
Akeman, Rebecca	18/09/2007	Female	001295	3	3TO		✔
Akeman, Richard	02/02/2011	Male	001397	R	ELM		✔
Akeman, Steven	02/02/2011	Male	001398	R	ELM		✔
Alala, Candis	02/10/2011	Female	001461	N2	PM	✔	✔
Alamilla, Sofia	02/12/2010	Female	001480	R	PINE		✔
Amnar, Tarak	05/02/2007	Male	001236	4	4ES		✔
Anderson, Neo	06/05/2005	Male	001042	6	6KH		✔

2. To specify the class type for an individual pupil, click in the applicable cell of the **Nursery** or **Other** column to enter a tick. Clicking the cell again removes the tick.

3. If all or the majority of pupils need to be assigned the same class type, the following method can be used to quickly populate the **Nursery** and **Other** columns:

    a. Right-click the **Other** column header then select **Check All**.

    b. In the **Pupils View** panel, select, for example, Year **N2** from the **YTI** drop-down list. Year **N2** pupils only are displayed in the **Pupils** panel.

    c. Right-click the **Nursery** column header then select **Check All**.

    d. Repeat steps *b* and *c* for any additional Nursery classes.

e. To check your selections, select **All** from the **Year Group** drop-down list.

4. Click the **Save** button.

   If a message is displayed advising that some pupils have not been assigned a class type, click the **Yes** button then ensure that a class type is allocated to every pupil before saving again.

   Click the **OK** button to return to the **Census Return Details** page, where the updated class types are displayed.

Resetting All Class Types

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

Re-enter the correct class types as previously described.

Identifying which Pupils have no Class Type Specified

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

☐ **Completed**

Checking Early Years Data

Applicable to schools with 2, 3 or 4 year old pupils

Hours at Setting and Funded Hours are collected from all schools that have pupils aged 2, 3 and 4 on-roll on census day. The hours collected in this return are for the week in which the census day falls.

Hours at Setting reflects the number of hours that the child attends the setting during census week.

Funded Hours signifies the level of free entitlement of education attracted by the child in that setting. This data is used to determine the Dedicated Schools Grant allocation, which the DfE uses to fund Local Authorities for the provision of education.

All schools (with the exception of City Technology Colleges and non-maintained Special schools) are required to submit the Funded Hours as a separate data item, while still providing Hours at Setting.

Data is collected for pupils whose date of birth falls in the date range 01/09/2010 to 31/03/2014 inclusive.

1. Select **Tools | Statutory Return Tools | Update Early Years** to display the **Update Early Years** page.

    The values displayed on the **Update Early Years** page default to those of the previous Spring Census. Existing details should be checked and edited, if necessary, and the details of any new pupils added.

The **Update Hours** button is available to Primary schools only. It enables Hours at Setting, for pupils who are receiving free nursery care, to be updated automatically (provided that Early Years Attendance Patterns have been defined via **Focus | Pupil | Pupil Details**).

2. Click the **Update Hours** button to display the number of hours that the listed pupils are expected to attend during the census week (based on the early years provision times recorded as part of their attendance pattern).

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

3. To add or edit the number of **Hours at Setting** or **Funded Hours** for an individual pupil, select the required criteria from the options in the **Pupils View** panel. Highlight the required pupil, click the applicable cell and then enter the required number of hours.

    > *IMPORTANT NOTES: A value between 0 and 99.5 must be entered for each pupil. Hours must be entered in increments of 0.5 <u>only</u>.*
    >
    > *0 (zero) is a <u>valid</u> value. If the value entered is within the accepted range but higher than expected by the DfE, a validation error is displayed when the return is created and validated. An explanation as to why the value is higher should be recorded on the COLLECT Portal.*
    >
    > *To avoid a related validation error being displayed when the return is created and validated, cells in the **Hours at Setting** and **Funded Hours** columns must <u>not</u> be left blank. Enter a value between 0 and 99.5.*

4. If most of the pupils are receiving the same number of hours, the following method can be used to populate the column quickly:

    a. In the **Pupils View** panel, select the required year group from the **YTI** (Year Taught In) drop-down list. Only the selected pupils are displayed in the **Pupils** panel.

    b. Right-click in the **Pupils** panel then select **Select All** from the drop-down list.

    c. Click in one of the highlighted cells of the column you wish to populate, i.e. **Hours at Setting** or **Funded Hours**, then enter the number of hours that is applicable to the majority of pupils.

        This number is then entered automatically for the remaining pupils.

    d. Click to the right of the grid to deselect all.

    e. Edit the entry for each pupil who is receiving a different number of hours. This is achieved by highlighting the required pupil, clicking in the associated **Hours at Setting** or **Funded Hours** cell as applicable, then entering the required number.

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

    The Early Years report is available from the **Detail Report** drop-down list via **Routines | Statutory Returns | School Census**.

☐ **Completed**

Identifying which Children have no Hours Recorded

1. On the **Census Return Details** page, click the **Edit** button (located in the **Hours for Early Years** panel) to display the **Update Early Years** page.

2. In the **Pupils View** panel, ensure that the required **Age at** date, **YTI** and **Reg** group are selected then select **No Hours at Setting** (or **No Funded Hours**) from the **Status** drop-down list.

   Only pupils who do not have an entry for **Hours at Setting** (or **Funded Hours**) are displayed.

3. Enter the required values for these pupils as described previously.

4. Click the **Save** button.

Updating Pupils with Top-Up Funding

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

1. Select **Tools | Statutory Return Tools | Update Top-Up Funding** to display the **Update Pupils with Top-up Funding** page.

   Any pupils currently recorded as having top-up funding are displayed in the **Top-up Funding** table.

2. Use the search criteria to locate the additional pupils you wish to record as having top-up funding then highlight their details.

3. Click the **Add** button. The highlighted pupils are displayed in the **Top-up Funding** table.

4. To remove a pupil from the list, highlight the required pupil then click the **Remove** button. The pupil's record is displayed in the first table, providing a chance to reselect the pupil, if required.

5. Click the **Update** button to save the data and arrange the list of pupils in **Surname** order.

☐ **Completed**

Updating Pupils Adopted from Care

Information regarding pupils who were looked after immediately before adoption is collected in the return.

1. Select **Tools | Statutory Return Tools | Update Adopted from Care** to display the **Update Pupils Adopted from Care** page.

Any pupils currently recorded as being adopted from care are displayed in the **Adopted from care** table.

2. Use the search criteria to locate the additional pupils you wish to record as being adopted from care then highlight their details.

3. Click the **Add** button. The highlighted pupils are displayed in the **Adopted from care** table.

4. Ensure that the correct adopted from care status is displayed for all the pupils by clicking the **Adopted from Care** cell then selecting the applicable 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)**.

5. To remove a pupil from the list, highlight the required pupil then click the **Remove** button. The pupil's record is displayed in the first table, providing a chance to reselect the pupil, if required.

6. Click the **Update** button to save the data and arrange the list of pupils in **Surname** order.

☐ **Completed**

Updating Provider Status

Applicable to Pupil Referral Units only

The term Provider Status is an indicator of where a pupil is educated, i.e. Further Education College (**FE College**) or **Other Provider**. The information is required from Pupil Referral Units only.

In preparation for the forthcoming School Census, a Provider Status should be recorded where applicable, for each pupil who is expected to be on-roll on census day. You can edit the records at census time, if required.

NOTE: Guest pupils are not included in the census and are therefore not displayed in any list.

1. Select **Tools | Statutory Returns | Update Provider Status** to display the **Update Provider Status** page, where all pupils who are on-roll on census day are displayed.

2. The following options can be used to sort and filter the display:

    ▪ The options available in the **Pupils View** panel can be used to restrict the list of pupils displayed. **Year Group**, **Reg** group taught in and the **Status** of the data displayed, e.g. **No Provider Status**, can be selected.

    ▪ The display can be sorted by **Name**, **Date of Birth**, **Gender**, admission number (**AdNo.**), **Year** group, and **Reg** group. Right-click the applicable column heading, then select **Sort By** from the drop-down list. The list of pupils is then re-arranged into your chosen sort order.

3. To specify the provider status for an individual pupil, click the **FE College** or **Other Provider** cell adjacent to the pupil's details to display a tick. Clicking again removes the tick, if required.

4. If all pupils listed are educated at the same provider, right-click the appropriate column heading (i.e. **FE College** or **Other Provider**), then select **Check All** from the drop-down list. All records in that column are ticked.

5. When all updates have been made, click the **Save** button to save your changes and refresh the **Enrolment Status** list to reflects the updated provider statuses.

    The values displayed in the **Enrolment Status** column are those collected in the return.

    > *IMPORTANT NOTE: The **Enrolment Status** is recorded in the **Registration** panel via **Focus | Pupil | Pupil Details**. It is unusual for Pupil Referral Units to change the enrolment status.*
    >
    > *Any update(s) made on the **Update Provider Status** page are for School Census purposes only and do not change the details recorded via the **Focus** menu.*

6. Click the **OK** button to return to the **Census Return Details** page, where the updated provider status values are displayed.

<div align="right">☐ **Completed**</div>

Identifying which Pupils have no Provider Status Recorded

To view which pupils have no provider status assigned to them, select **No Provider Status** from the **Status** drop-down list in the **Pupils View** panel. Any pupils without a provider status are displayed in the **Pupils** panel.

If applicable, a provider status can be entered for these pupils, in the way described previously before clicking the **Save** button.

Resetting Provider Status Values

To reset all provider status values, right-click in the **FE College** or **Other Provider** column header, then select **Remove All** from the drop-down list. The column is cleared of all ticks.

Re-enter correct values as previously described, then click the **Save** button.

05| **What Next?**

After carrying out the preparation routines documented in this guide, ensure that any subsequent changes at your school (e.g. pupil basic detail changes, SEN provisions changes, leavers and admissions/re-admissions, etc.) are recorded accurately in SIMS.

The SIMS 2016 Spring Release (7.168) must be installed before completing the School Census Summer 2016 Return. However, it is advisable to check whether a later version of SIMS is available and then upgrade to the current release, if necessary, as it may include updates applicable to the forthcoming return.

You should now be ready to produce the final School Census Summer 2016 Return. For specific instructions, please refer to the *Producing the School Census Summer 2016 Return* handbook applicable to your school phase, i.e. Nursery, Primary, Middle deemed Primary, All-Through, Special or Pupil Referral Unit.

Where Can I Get More Information

- In addition to this preparation guide, handbooks outlining how to produce the School Census Summer Return (via **Routines | Statutory Returns | School Census**) and an Errors and Resolutions document (which provides suggestions on how to resolve any validation errors or queries) are being prepared:

    - *Producing the School Census Summer 2016 Return (English Nursery Schools)* handbook

    - *Producing the School Census Summer 2016 Return (English Primary/Middle deemed Primary Schools)* handbook

    - *Producing the School Census Summer 2016 Return (English All-Through Schools)* handbook

    - *Producing the School Census Summer 2016 Return (English Special Schools)* handbook

    - *Producing the School Census Summer 2016 Return (English Pupil Referral Units)* handbook

    - *School Census 2015/2016 Errors and Resolutions* document.

You may also find the information in the *Managing Pupil/Students* handbook helpful, as it provides details about the processes that relate to the adding and editing of pupil data in SIMS.

These documents, together with other useful information, e.g. news items, can be found on the My Account website (https://myaccount.capita-cs.co.uk) by using the search facility to find CENSUS16. A list of all available supporting documentation is displayed, from which the required resources can be selected. Please check My Account on a regular basis because documents will be uploaded as they are completed.

A wide range of other documentation, including handbooks, quick reference sheets, tutorials, etc. can be accessed via the **Documentation Centre** by clicking the **Documentation** button located at the top of the SIMS **Home Page**. Once open, click the required category button, then select the required document.

Any documents mentioned in this handbook can be accessed via the **Documentation Centre** unless otherwise specified.

- There is a comprehensive online help system available in SIMS, accessed by clicking the applicable **Help** button or by pressing **F1** from anywhere in the software.

- The My Account website (https://myaccount.capita-cs.co.uk) also included **Hot Topics** (Collections of articles from our Knowledge Base and other resources surrounding popular topical subjects such as preparing for the new school year) and the Knowledge Base (search by keywords or Knowledge Base ID to find answers for queries already logged with our customer support desk).

> **IMPORTANT NOTE:** *If you receive support from a local authority or third party support team check with them before using any of the solutions.*

- The DfE website also contains preparation and guidance documentation (http://www.education.gov.uk/).

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SBS

School Business Services

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