**SBS**
School Business Services

Applicable to 7.168 onwards

# Producing the School Census Summer 2016 Return

Special Schools

**SIMS**

helping schools inspire

Accredited Support

# C| Contents

# *01* | **Introduction**

## Overview

This handbook provides the information needed by Special schools in England to complete the School Census Summer 2016 Return, which takes place on Thursday 19 May 2016.

The School Census Summer 2016 Return is required to be completed by maintained Nursery schools, Primary schools, Middle schools, Secondary schools, All-Through schools, Special schools, Pupil Referral Units (PRUs), City Technology Colleges (CTCs) and Academies (including free schools) in England. Non-maintained Special schools are also required to submit the return.

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

A list of items collected from Special schools in England for the School Census Summer 2016 Return is available in a later section of this handbook (please see *Preparing Data for the School Census Return* on page 6).

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

# How has the School Census Summer Return Changed?

Changes to the School Census Summer Return include the following:

## 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

Exclusions collection period: 01/09/2015 to 31/12/2015

Learner Support collection period: 01/08/2015 to 19/05/2016

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 *30*

## On-Roll Basic Detail Report - Display Change

### Routines | Statutory Returns | School Census

In the On Roll Basic Report, the identification of pupil/students 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.

**More Information:**
*On-Roll Basic Details Report* on page *33*

## 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**.

**More Information:**
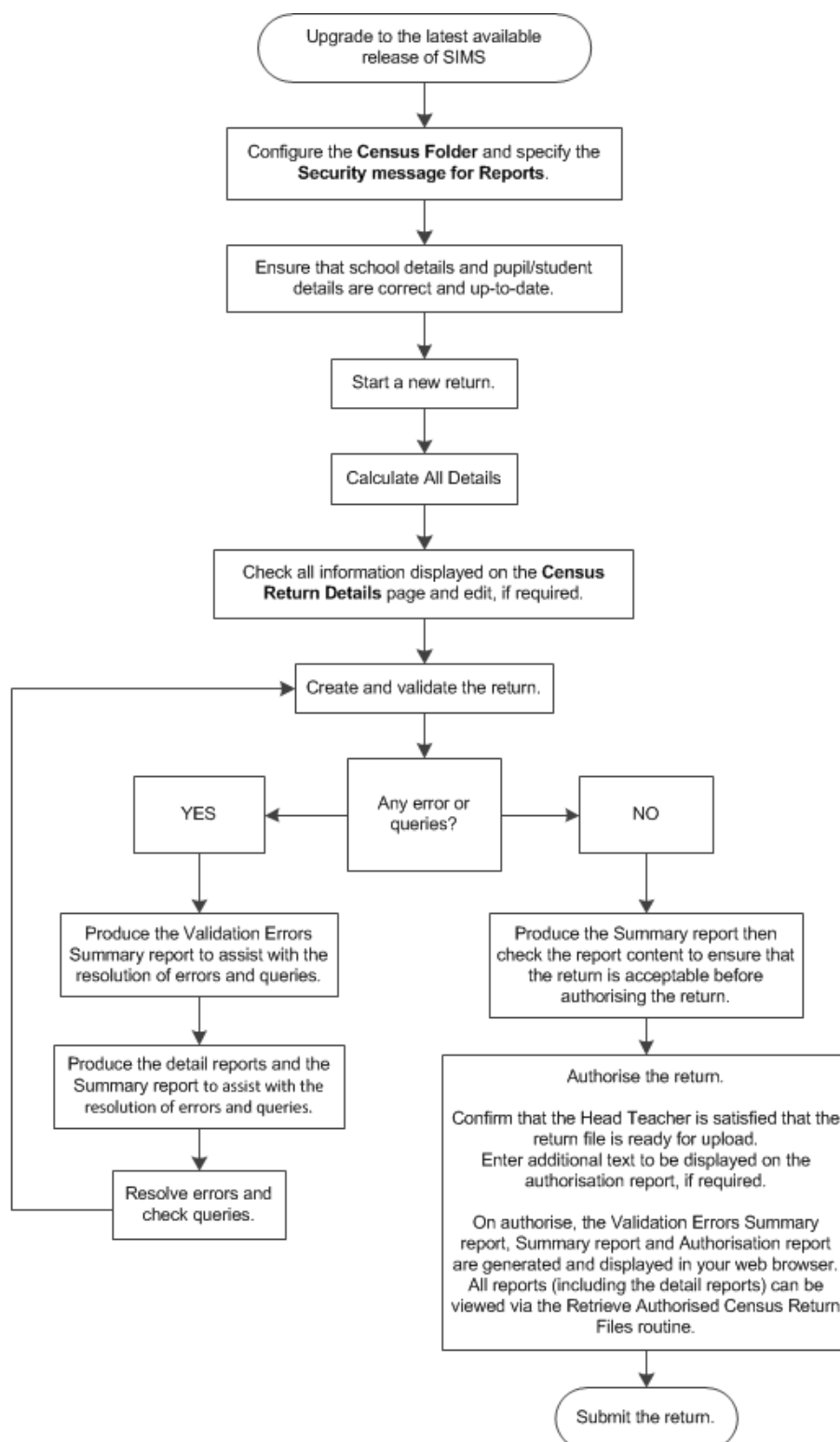*Retrieving Authorised Census Return Files* on page *42*

**Additional Resources:**
*Designing and Running Reports* handbook

# Steps to Producing the School Census Return

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

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.

↓

Create and validate the return.

↓

Any error or queries?

YES ← → NO

**YES:**
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:**
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.

# Where to Find More Information

Online help can be accessed by pressing **F1** or clicking the applicable **Help** button in SIMS.

A wide range of documentation is available from the SIMS **Documentation Centre**, including handbooks, quick reference sheets and tutorials. Click the **Documentation** button (located on the top right-hand side of the SIMS **Home Page**), select the required category and then select the required document. A search facility is available on the top right-hand corner of each page of the **Documentation Centre**.

These and other documents are also available from the My Account website (https://myaccount.capita-cs.co.uk). The most popular documents can be located by selecting **Knowledge Base | SIMS Publications** (located in the **Popular Searches** list). Alternatively, use the **Knowledge Base** search facility to display a list of all **Documents** containing the search criteria.

- **Search for**:
  - Surround a phrase with "double quotes" to find an exact phrase.
  - Prefix words with **+** to make them essential, e.g. "Behaviour Management" +Primary +Training.
- **Product**: Select the required product from the drop-down list.
- **From** and **To**: Entering a date or date range when the document was uploaded helps to filter the search results further.

In addition to this handbook, a preparation guide that outlines how to prepare your data for the School Census, together with an Errors and Resolutions document that provides suggestions on how to resolve any validation errors or queries, are also available.

To access the School Census documents, please search for CENSUS16 in the SIMS **Documentation Centre** or My Account.

# *02|*Preparing for the School Census Summer Return

## 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/student 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 between 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.



# Preparing Data for the School Census Return

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

The following information is collected from Special schools for the School Census Summer 2016 Return.

### School Level

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

### Pupil/Student Level

- Pupil/Student Identifiers: unique pupil number (UPN), unique learner number (ULN), former UPN, surname, forename, middle names, former surname, preferred surname, date of birth and gender.

- Characteristics: free school meal eligibility start date, end date and UK country in which the eligibility applies, school lunch taken, language code, funded hours, hours at setting, top up funding indicator, adopted from care indicator, Youth Support Services Agreement (YSSA) indicator and Learner Support code.

- Status: enrolment status, date of entry, date of leaving, part-time indicator, boarder indicator and actual national curriculum year group.

- Special Educational Needs: SEN provision.

- Termly Exclusion Information (01/09/2015 to 31/12/2015): exclusion category, reason for exclusion, in care indicator, SEN provision, exclusion start date, and actual number of sessions excluded from.
- Home Information: pupil/student's home address.

   For more information and instructions on all of the preparations that need to be carried out before the census return is produced, please refer to the appropriate *Preparing for the School Census Summer 2016* guide. This, together with other useful School Census documentation, can be found on the My Account website (https://myaccount.capita-cs.co.uk) by using the search facility to find CENSUS16.

# *03|* Completing the School Census Summer Return

## Creating a New School Census Return

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

The School Census Summer 2016 Return collects data for:

▪ all pupil/students on the register on census day (19/05/2016).

▪ any additional pupil/students <u>not</u> on-roll on census day who:

  ▪ had an exclusion that started between 01/09/2015 and 31/12/2015.

  ▪ were awarded Learner Support funding from 01/08/2015 to 19/05/2016.

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

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



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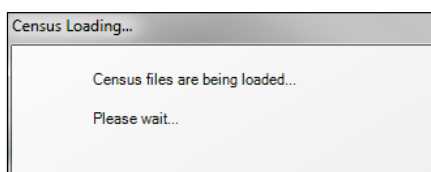
*NOTE: The first time that the **Routines | Statutory Returns | School Census** menu route is selected during each SIMS session, there is a delay while the School Census files are loaded.*

---

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



By default, **Summer 2016** is displayed in the **Term** field.

> *TIP: To view a Spring return, select from the **Term** drop-down list then click the **Search** button.*

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

**More Information:**
*Specifying the Security Message for Reports on page 11*
*Deleting an Unauthorised Return on page 44*

# Configuring the Census Folder

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

> **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, consult with your IT Security Officer before proceeding.*

1. Specify the folder where the return files are to be stored by entering the folder location in the **Census Folder** field.

   Alternatively, click the **Browse** button to display a standard Windows® **Browse For Folder** dialog.

   | ... | *Browse button*
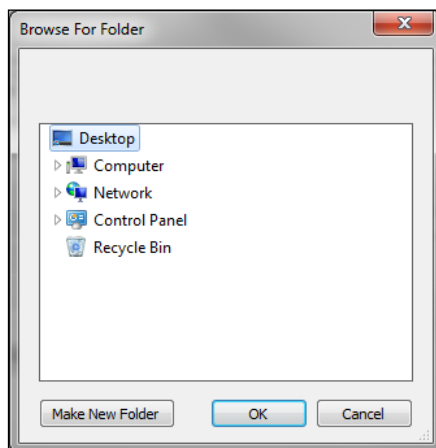
   

   Navigate to the location of the required folder and highlight it. If a suitable folder does not exist, click the **Make New Folder** button and enter a suitable name for the new folder.

2. Click the **OK** button to select or create the folder and return to the browser, where the new folder name is displayed.

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

3. Ensure that the **Security Message for Reports** is appropriate for your school.

## Specifying the Security Message for Reports
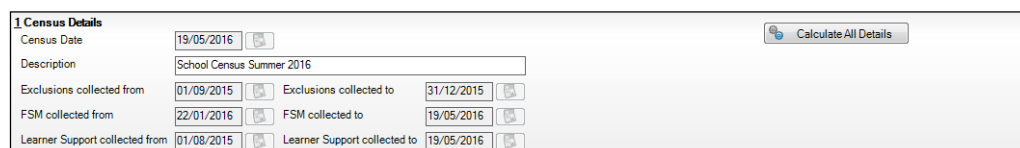
At the bottom of the browser is a **Security Message for Reports** field, which contains text that will be displayed at the top of each report.

1. The security message text defaults to `This report contains sensitive information`, but can be edited, if required.

2. If any edits are made, you can click the **Default Message** button to revert to the default text.

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

# Editing Census Details

The **Census Details** panel displays the following <u>read-only</u> information:

- Census Date: 19/05/2016
- Exclusions data collected from 01/09/2015 to 31/12/2015
- FSM (Free School Meal) data collected from 22/01/2016 to 19/05/2016
- Learner Support collected from 01/08/2015 to 19/05/2016.



By default, the return **Description** is displayed as **School Census Summer 2016**. This description can be edited, if required, e.g. to identify a dry run.

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

## Calculating All Details

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

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

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

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

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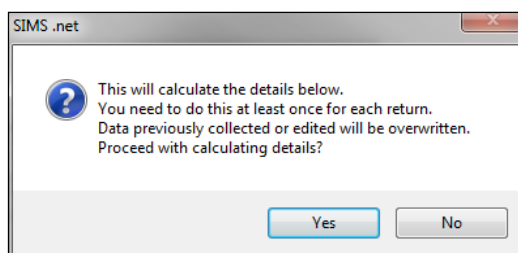


2. Click the **Yes** button to calculate all details. At this point, depending on the number of pupil/students in the school, there may be a short delay while details are calculated.

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

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

# Editing School Information

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

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

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



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

> *NOTE: The **Establishment Number** and the **School Phase** cannot be edited. If the information displayed is incorrect, please contact your Local Support Unit.*

**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**.

3. Click the **Save** button then click the **OK** button to return to the **Census Return Details** page, where the updated details are displayed.

# Updating Early Years Data

Hours at Setting and Funded Hours data is collected from all schools that have early years pupils on-roll on census day. The hours collected in this return are for the week in which the census day falls.

The required data can be recorded via the **Edit** button in the **Hours for Early Years** panel or via **Tools | Statutory Returns Tools | Early Years - Update Early Years** page.

If data has been recorded previously, the values are displayed in the **Hours for Early Years** panel, which is read-only.



## Adding/Editing Early Years Data

1. In the **Hours for Early Years** panel, click the **Edit** button to display a message informing you that hours data has been brought forward from the previous census.
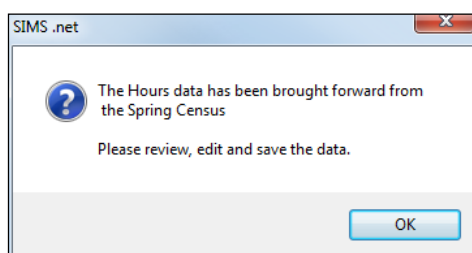


2. Click the **OK** button to display the **Update Early Years** page. By default, the current term is displayed in the **Census** panel.

3.  Select the required **Term** from the drop-down list, if you want to view the data recorded for a previous term (in the current calendar year).



4.  To add or edit the number of **Hours at Setting** (or **Funded Hours**) for an individual pupil, select the required criteria in the **Pupils View** panel.

    In the **Pupils** panel, highlight the required pupil then click the applicable cell and enter the required number of hours.

    > **IMPORTANT NOTE:** *The number of hours entered per pupil must be between 0.0 and 99.5. Hours must be entered in increments of 0.5 <u>only</u>.*



5.  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 **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.

6. 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.

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

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*IMPORTANT NOTES:*
*If, while completing the return, any of the following processes are performed, click the **Recalculate** button (located on the top right-hand side of the panel) to ensure that the up-to-date data is displayed in the **Early Years** panel:*
- *Hours at Setting or Funded Hours are edited via the **Tools** menu*
- *a new pupil is added in SIMS*
- *a pupil's date of birth is amended.*

*Please note that updating Hours at Setting or Funded Hours on the **Update Early Years** page updates the display in the **Early Years** panel automatically.*

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### 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.
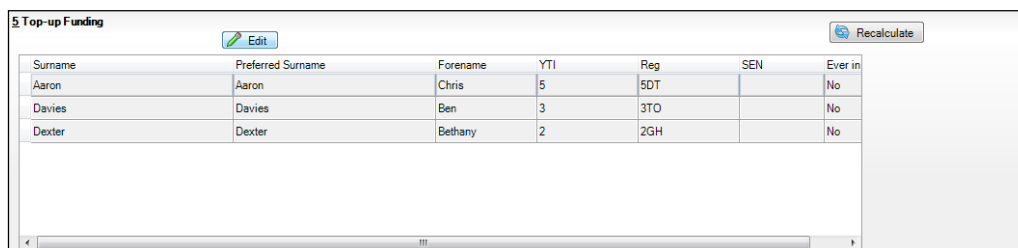
4. Click the **Save** button.

## Updating Pupil/Students with Top-Up Funding

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

The **Top-up Funding** panel enables you to record the on-roll pupil/students for whom your school is receiving top-up funding on census day.
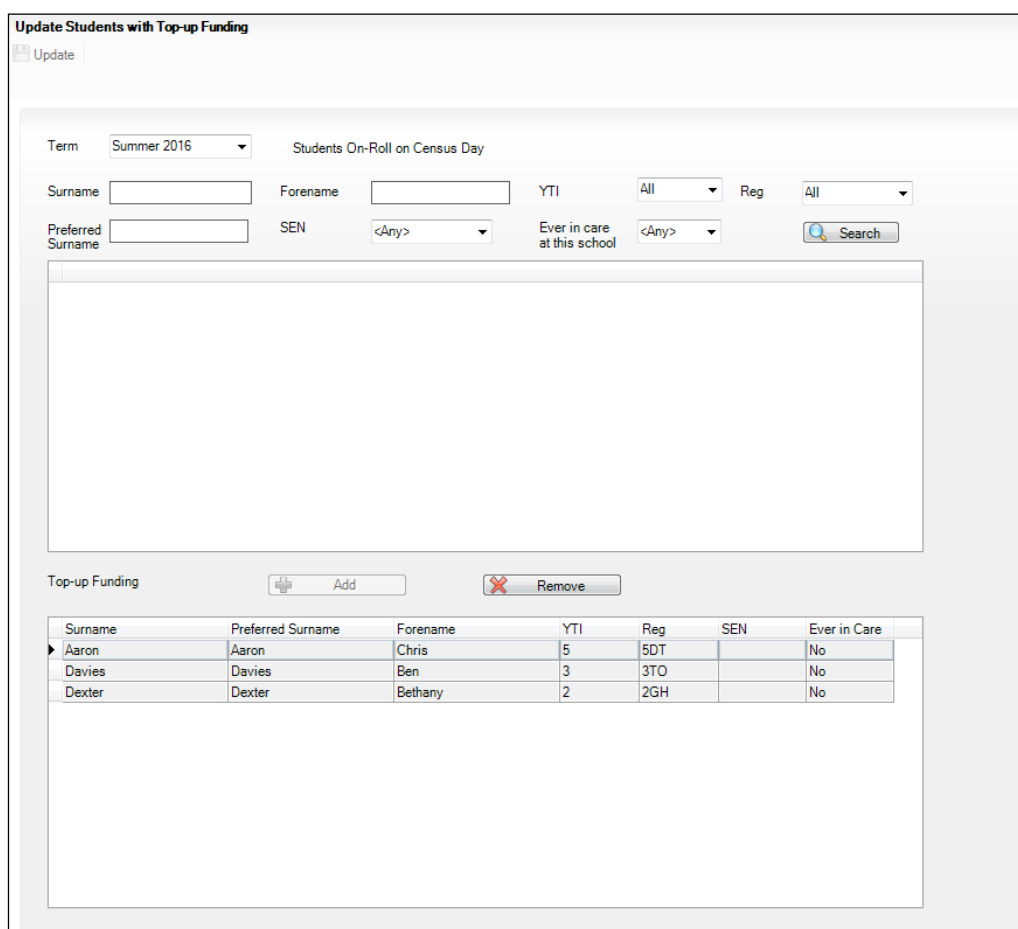
If the pupil/students with top-up funding have been recorded previously via **Tools | Statutory Return Tools | Update Top-Up Funding**, the data is displayed in the **Top-up Funding** panel.



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

1.  Click the **Edit** button to display the **Update Pupil** (or **Student**)**s with Top-up Funding** dialog. The pupil/students currently recorded as having top-up funding are displayed in the **Top-up Funding** section.

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



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



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

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

6.  Click the **OK** button (located at the bottom right-hand side of the screen) to return to the **Census Return Details** page, where the updated information is displayed in the **Top-up Funding** panel.

**Additional Resources:**

*Preparing for the School Census Summer 2016 Return* handbook

**More Information:**
*Top-up Funding Report* on page *35*

# Updating Pupil/Students Adopted from Care

The Adopted from Care routine enables you to record which pupil/students were looked after immediately before adoption and whether documentary evidence exists to prove DfE/Ofsted compliance. It is not compulsory for adoptive parents, etc. to inform the school of this information.

If the pupil/students who have been adopted from care have been recorded previously via **Tools | Statutory Return Tools | Update Adopted from Care**, the data is displayed in the **Adopted from Care** panel.

| Surname | Preferred Surname | Forename | YTI | Reg | Ever in Care | Adopted from Care |
|---------|------------------|----------|-----|-----|-------------|-------------------|
| Aaron | Aaron | Chris | 11 | 11A | No | Ceased to be looked after through Adoption |
| Cookson | Cookson | Harry | 8 | 8E | No | Ceased to be looked after through a Special Guardianship Order (SGO) |
| Jones | Jones | Joe | 9 | 9A | No | Ceased to be looked after through a Residence Order (RO) |
| Talk | Talk | Joe | 13 | G | No | Ceased to be looked after through Adoption |

The information displayed in the **Adopted from Care** panel is read-only. Updating the adopted from care information, e.g. editing the **Adopted from Care** status or adding a pupil/student to the list of pupil/students adopted from care, must be done via the **Edit** button.

1. Click the **Edit** button to display the **Update Pupil** (or **Student**)**s Adopted from Care** dialog. The pupil/students currently recorded as being adopted from care are displayed in the **Adopted from care** table.



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



3. Click the **Add** button. The highlighted pupil/students are transferred to the **Adopted from care** table.

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



4. Ensure that the correct adopted from care status is displayed for all the pupil/students 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)**.

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

*You do not need to change any existing residence orders but new adopted from care records must be recorded as child arrangement orders.*

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5. If applicable, select the **Evidence Obtained** check box to indicate that document(s) have been obtained that provide evidence that the pupil/student has been adopted from care. Such documents are confidential and must be stored securely.

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

7. Click the **Update** button to save the data and arrange the list of pupil/students in **Surname** order.

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

8. Click the **OK** button (located at the bottom right-hand side of the screen) to return to the **Census Return Details** page, where the updated information is displayed in the **Adopted from Care** panel.

> *NOTE: The **Evidence Obtained** information is not collected in the return and is therefore not displayed in the **Adopted from Care** panel.*

**Additional Resources:**
*Preparing for the School Census Summer 2016 Return* handbook

**More Information:**
*Adopted from Care Report* on page *35*

# Managing School Dinners Taken on Census Day

Applicable to schools with pupil/students 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 pupil/students 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 inclusive.*

All pupil/students 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 pupil/students who receive a Universal Infant School Meal (school dinner) on census day.

The **School Dinner Taken** panel displays all pupil/students in Reception, Year 1 and Year 2 who are on-roll on census day. The options available in the panel enable you to record pupil/students who have taken a Universal Infant School Meals on census day, so that accurate data can be included in the census.

> *NOTES: The **Reference Date** is provided so that your school can report school dinners taken on an alternative date to census day, if required.*
>
> *The pupil/students listed in the **School Dinner Taken** panel are those who are on-roll on census day. Whereas the data calculated via the **Calculate From Attendance** and the **Calculate From Dinner Money** buttons is based on the reference date.*

If your school uses SIMS Dinner Money or SIMS Attendance, the number of dinners taken on census day can be calculated using the data recorded when using these modules. If either or both of these modules are <u>not</u> in use, the applicable **Calculate From**... button(s), as displayed in the following graphic, are <u>not</u> displayed but the information can be recorded manually.



| ❶ | By default, the **Reference Date** is set to 19/05/2016 (census day). If, due to exceptional circumstance, e.g. flooding, pupil/students were unable to take a school dinner on census day, the reference date can be changed to a date that reflects the normal situation. |
|---|---|
| ❷ | Click the required column header to sort the data. |
| ❸ | The **Calculate From Attendance** button is displayed only if SIMS Attendance is in use. |
| ❹ | The **Calculate from Dinner Money** button is displayed only if SIMS Dinner Money is in use. |
| ❺ | When the **Reset** button is clicked all existing ticks are removed from the **School Dinner Taken** column enabling you to start the process again. |
| ❻ | The **Total Taken** and **Total Not Taken** provide an indication of whether the number of school dinners taken is correct or whether edits are required. |

After the return has been created and validated, the School Dinner Taken detail report can be run to assist with the checking of results.

**More Information:**
*School Dinner Taken Report* on page *34*

## Using Dinner Money to Calculate School Dinners Taken on Census Day

If SIMS Dinner Money is in use, the Dinner Money data recorded for census day can be used to calculate the number of school dinners taken on census day.

Many users of SIMS Dinner Money also use SIMS Attendance. If this is the case the **Calculate From Attendance** button is also displayed.

However, it is recommended that the Calculate From Dinner Money routine is used in the first instance. This is because the Calculate From Attendance routine looks at all pupil/students with a present or late attendance mark on census day morning. These pupil/students could be taking any sort of meal on census day, e.g. going home for lunch, pack lunch brought from home, as well as meals provided by the school. The School Census return is only interested in school meals provided by the school.

SIMS Dinner Money takes into account these different meal types and populates the **School Dinner Taken** column with ticks where meals provided by the school only have been taken.



1. Click the **Calculate From Dinner Money** button.

   > **WARNING:** *Clicking the **Calculate From Dinner Money** button overwrites all existing data in the **School Dinner Taken** panel.*

   If SIMS detects missing information, the following message is displayed:

   **Dinner Money information is incomplete. Please ensure that meals are recorded in Dinner Money.**

2. Click the **Cancel** button to return to SIMS where the missing information can be entered or the **OK** button to continue.

   A tick is entered against each pupil/student who is receiving any type of meal provided by the school on census day. These meals have a meal type category of **School Provided**, with a description such as hot school meal or school sandwich.

3. Edit the information by clicking the required row, in the **School Dinner Taken** column, to toggle between a tick and blank (no meal taken), as required.

## Using Attendance to Calculate School Dinners Taken on Census Day

The School Census Return only requires information about school meals provided by the school on census day. However, if SIMS Attendance is in use, the attendance data recorded for census day morning can be used to calculate all pupil/students who are present and are likely to be taking a school dinner.

The information calculated from attendance can be edited to so that school meals provided by the school only are collected in the return.

1. Click the **Calculate From Attendance** button.

   > **WARNING:** *Clicking the **Calculate From Attendance** button overwrites existing data in the **School Dinner Taken** panel.*

   If missing marks exist, a message is displayed:

   **Please ensure that registers have been taken. Missing marks have been interpreted as absent and no dinner taken.**

2. Click the **Cancel** button to return to SIMS where missing marks can be entered or the **OK** button to continue.

   A tick is entered against each pupil/student who is marked as present on census day morning (i.e. AM session). It is possible that some of these pupil/students are not taking meals provided by the school, e.g. they go home for dinner or bring a packed lunch from home. Meals provided by the school only are required for the return.

   Use the **Group By** functionality to group pupil/students by **Year Taught In**, **Reg Group** or **Enrolment Status**, enabling school dinners taken information to be updated from class lists, etc.

3. Edit the information by clicking the required row, in the **School Dinner Taken** column, to toggle between a tick and blank (no meal taken), as required.

## Using Manual Entry to Record School Dinners Taken on Census Day

If your school is not using SIMS Dinner Money or SIMS Attendance the number of school dinners taken on census day (i.e. meals provided by the school) can be entered manually.

1. Click the **Tick All** button to populate the **School Dinner Taken** column. All pupil/students are ticked indicating that they received a school dinner on census day.

2. Edit individual records by clicking the applicable **School Dinner Taken** cell to toggle between a tick and blank (no meal taken).



The **Total Taken** and **Total Not Taken** (located at the bottom of the panel) provide an indication of whether the number of school dinners taken is correct or whether further edits are required.

3. After the return has been created and validated, run the School Dinner Taken detail report then check the report contents.

4. Continue editing until school dinner taken details are correct.

> **WARNING:** *Clicking the* **Reset** *button removes all existing ticks from the* **School Dinner Taken** *column.*

# *04|* Creating and Validating the Summer Return

## Creating and Validating a School Census Return

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

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

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

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

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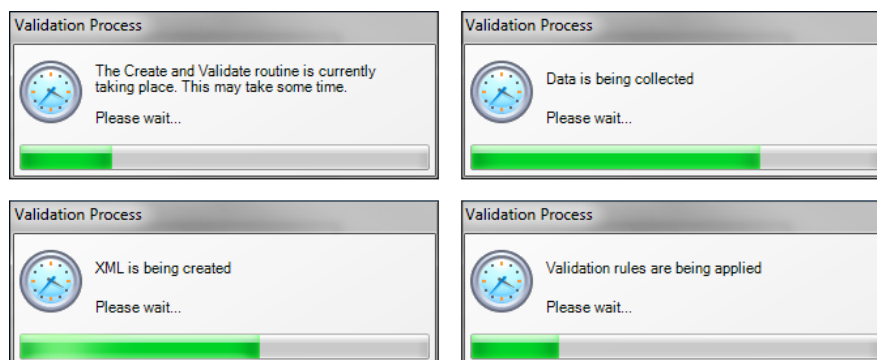


When the validation process is complete, the **Validation Errors Summary** panel is displayed at the bottom of the screen.

## 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. |

| Column | Description |
|--------|-------------|
| **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/student. Enter all or part of a UPN, pupil/student'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/student are displayed in the **Student Search** field. Click the **Find** button to display all errors and queries relating to that pupil/student.

- 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 (please see *Transferring Report Data to a Spreadsheet* on page *37*).

    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>_ValidationErrorsSumma ry.HTML`), is also stored in this folder.

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

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** (or **Student**) **| 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.

**More Information:**
*Transferring Report Data to a Spreadsheet* on page *37*

# Producing Detail Reports

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

Each detail report header displays the **Security Message** that was defined in the **Census Return** browser, the **Report Criteria** and the **Total Pupils** that are listed in the report.

Also shown at the top of the report is the **School Name**, the **Fileset Number**, the **Filename**, the **Report Created** date, and the **XML Version**.

The following reports are currently available:

### On-Roll Basic Details Report

Report Criteria: Pupil/students on-roll on census day.

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

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

### Leavers Basic Details Report

Report Criteria: Pupil/students not on-roll on census day.

- Leavers with exclusions two terms ago (01/09/2015 to 31/12/2015)
- Leavers with learner support of Vulnerable Group Bursary Awarded or Discretionary Bursary Awarded (01/08/2015 to 19/05/2016).

Where applicable, this report provides the following information about pupil/students not on-roll on census day: UPN, ULN, former UPN, legal surname, legal forename, middle name(s), former surname, date of birth, gender, date of admission, date of leaving, language, part-time status, boarder status, exclusions and Learner Support.

## Exclusions Report

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

This report provides the following details about pupil/students 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.

## SEN Report

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

This report provides a list of pupil/students 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: Pupil/students on-roll on census day.

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

## School Dinner Taken Report

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

- Pupil/students in Year Taught In R, 1 and 2.
- Pupil/students 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 pupil/students 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 pupil/students 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 pupil/students 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

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

The report displays the following information about pupil/students 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

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

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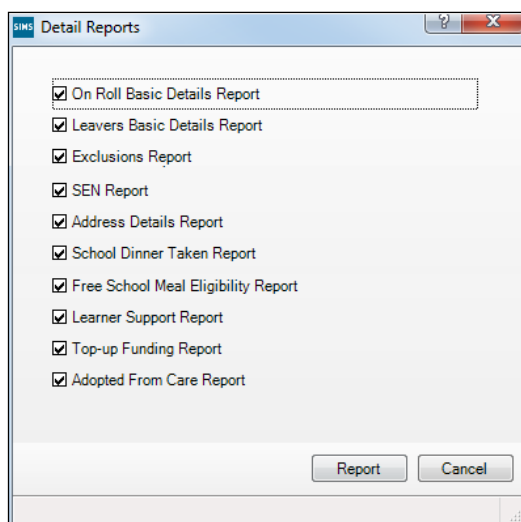


By default, all detail reports are selected. If any reports are not required, deselect the associated check box. Click the **Report** button to generate the selected report(s).

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

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

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

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

For example:
`8866676_SC2_886LL16_001_onroll_basic_details_report.html`.

![i] **More Information:**
*Configuring the Census Folder* on page *10*
*Transferring Report Data to a Spreadsheet* on page *37*

# Printing a Report from your Web Browser

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

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

# Transferring Report Data to a Spreadsheet

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

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

The spreadsheet contains the same level of sensitive information as the original HTML report from which it was transferred therefore, it is important that the file is saved to a folder with the same level of security.

# Deleting Temporary Web Browser Files

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

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

## Deleting the cache in Windows Internet Explorer 10

1. Select **Tools | Internet options** to display the **Internet Options** dialog.
2. Select the **General** tab.
3. In the **Browsing history** section, click the **Delete...** button to display the **Delete Browsing History** dialog.
4. Ensure that the **Temporary Internet Files and website files** check box is selected then click the **Delete** button.

   All temporary files (including any Statutory Returns reports files) that the browser has cached are deleted.
5. Click the **OK** button.

### Deleting the cache in Windows Internet Explorer 8 and 9

1.  Click the **Tools** button located on the far right-hand side of the toolbar.
2.  Select **Internet options** from the drop-down list to display the **Internet Options** dialog.
3.  Select the **General** tab.
4.  In the **Browsing history** section, click the **Delete...** button to display the **Delete Browsing History** dialog.
5.  Ensure that the **Temporary Internet Files** check box is selected then click the **Delete** button.

    All temporary files (including any Statutory Returns reports files) that the browser has cached are deleted.
6.  Click the **OK** button.

# Producing the Summary Report

The Summary report enables the accuracy and completeness of the return to be assessed by the school staff involved in preparing the return. It can also be used to assist the Head Teacher in the checking of data before authorising the return.

> *NOTE: When the return is authorised, the Summary report is automatically generated and displayed in your web browser, e.g. Windows® Internet Explorer.*

### Generating the Summary Report

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

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

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

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

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

For example: `8866676_SC2_886LL16_001_Summary_Report.html`.

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

**More Information:**
*Configuring the Census Folder* on page *10*

# Editing an Unauthorised Return

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

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

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

**More Information:**
*Configuring the Census Folder* on page *10*
*Specifying the Security Message for Reports* on page *11*
*Resolving Validation Errors and Checking Queries* on page *30*
*Producing Detail Reports* on page *33*
*Producing the Summary Report* on page *38*
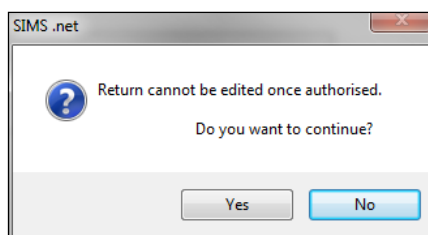
# Authorising the Return

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

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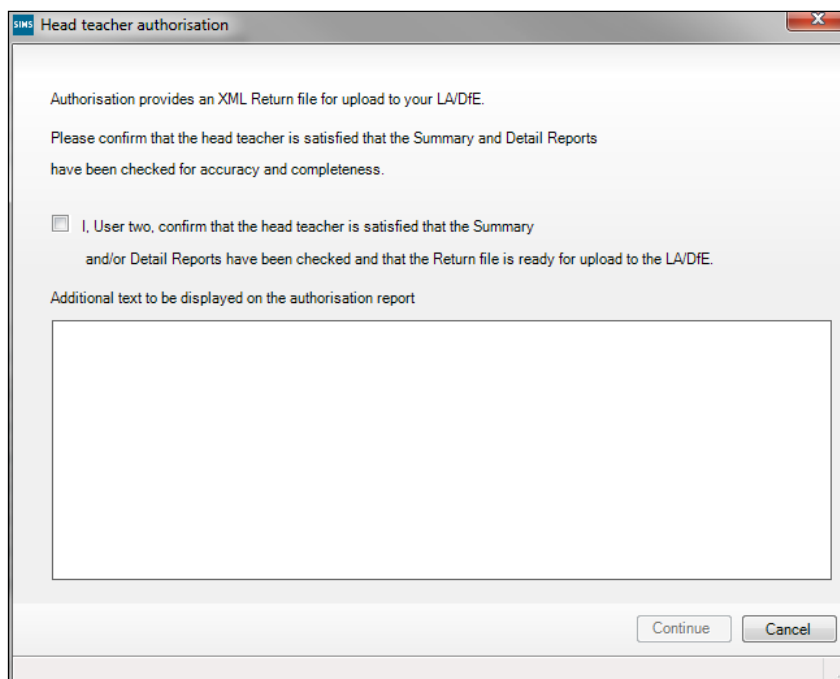
1. Click the **Authorise** button.

a message reminds you that the return cannot be edited once it is authorised.



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

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



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

    When the confirmation check box is selected, the **Continue** button is activated enabling you to complete the authorisation process.
5.  Click the **Continue** button to authorise the return.

    ▪   The Summary report, Authorisation report and Validation Errors Summary report are generated automatically and displayed in your web browser, from where they can be printed, if required.

    ▪   The return file extension changes automatically from UNA (unauthorised) to XML (authorised).

- All details, i.e. the reports and the XML file, are saved in the **Census Folder**, which was specified previously in the **Census Return for <season> <year> Term** browser.

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

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

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

If you authorise a return and subsequently need to make amendments, you must either make a copy of the return and work on the copy, or create a new return.

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

**Additional Resources:**

*Designing and Running Reports* handbook

**More Information:**
*Producing the Summary Report* on page *38*
*Retrieving Authorised Census Return Files* on page *42*
*Copying a Return* on page *43*

# Submitting the Return

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

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

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

**More Information:**
*Configuring the Census Folder* on page *10*
*Copying a Return* on page *43*

# Retrieving Authorised Census Return Files

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

1. Select **Tools | Statutory Returns Tools | Retrieve Authorised Census Return Files** to display the **Retrieve Authorised Census Return Files for <census name>** page.

2. Select the type of census required from the **Return Type** drop-down list to display a list of previous returns that match the selected criteria.

3. By default, the files **Download to** the folder specified in the census browser. To specify a different folder:

   a. Click the **Select a Folder** button (**...**) to display a standard Windows® **Browse For Folder** dialog. Navigate to the location of the required folder then highlight it. If a suitable folder does not exist, click the **Make New Folder** button then enter a suitable folder name.

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

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

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

4. Highlight the return you wish to retrieve then click the **Retrieve Files** button.

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

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

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

The Statutory Returns sub-report is available if **Student** has been selected as the Data Area. When selecting the fields to be included in the report, the Statutory Returns sub-report is located at the bottom of the list (the last node). Three options are available for selection under the sub-report: **Authorised Date**, **File Name** and **Description**.
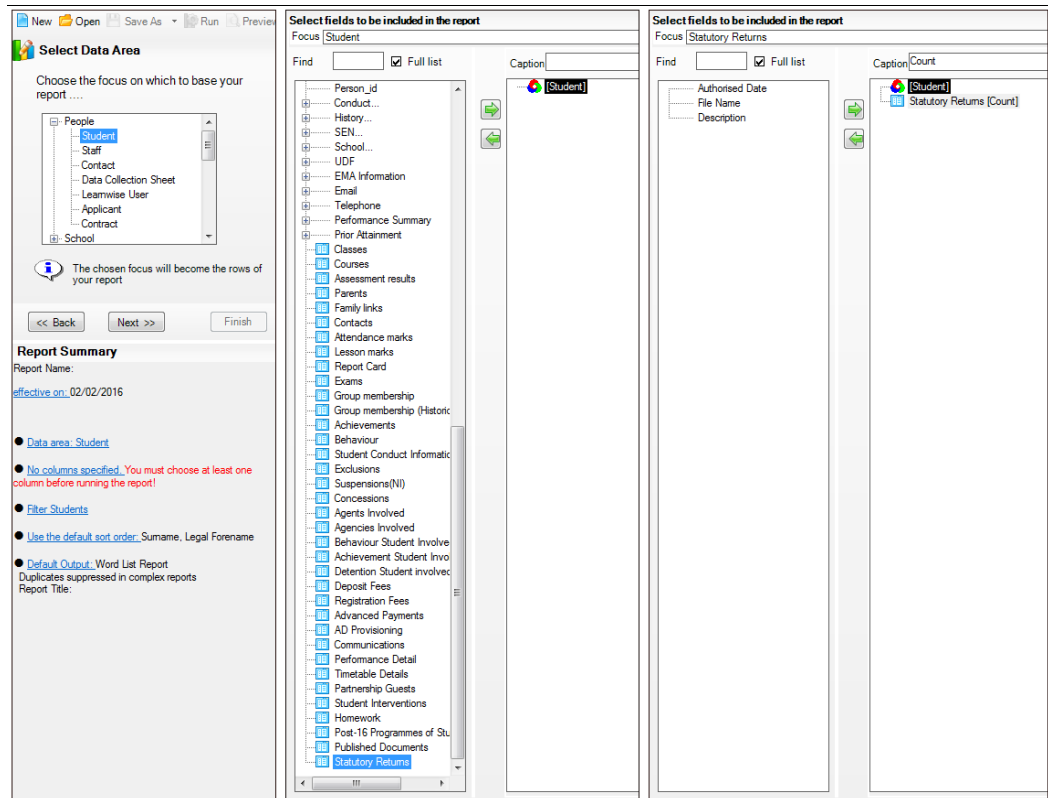


**Additional Resources:**

*Designing and Running Reports* handbook

# Copying a Return

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

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

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

1. Select **Routines | Statutory Returns | <name of census>** to display the census browser.

2. Click the **Search** button to ensure that the list of returns is displayed.

3. Highlight the file you wish to copy then click the **Copy** button.

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

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

4. Click the **Yes** button to make the copy, which is then displayed in the browser as:

   **Copy of <description of selected file>**.

5. To rename the copied return, highlight it then click the **Open** button to display the **Return Details** page.

6. In the **Census Details** panel, edit the **Description** then click the **Save** button.

   > **IMPORTANT NOTE:** *The new **Description** must be unique for this return. SIMS will not save the data if a duplicate return description is found.*

# Deleting an Unauthorised Return

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

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

> **IMPORTANT NOTES:** *When a return file is deleted, any associated files, e.g. Validation Errors Summary, detail reports, etc. that have been produced are also deleted.*
>
> *Any return files that have already been authorised cannot be deleted.*

1. Select **Routines | Statutory Returns | <Return name>** to display the browser.

2. Click the **Search** button to ensure that the list of return files is displayed.

3. Highlight the return file to be deleted then click the **Delete** button. A message prompts for confirmation that the selected return should be deleted.

4. Click the **Yes** button to permanently delete the selected return file and all associated report files.

   The deleted return file is removed from the browser and the storage folder, along with any associated reports.

# Index

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