

## Detailed Primary School End of Year Procedures for the academic year 2016/17



## C Contents 01| Setting Up the I

Setting Up the New Academic Year1
Overview1
Setting Permissions1
Where to Find More Information2
End of Year Procedure Check List 2
Routines for After the New Academic Year has Started
Recording Changes to Teaching Staff in Personnel4
Adding New Teachers to Personnel4
Creating the New Academic Year6
Defining the School Working Week7
Defining School Terms8
Adding Additional School Terms10
Defining Half Term Holidays11
Defining Teacher Training Days12
Defining Public Holidays14
Creating the New Academic Year15
Setting up the New Academic Year's Pastoral Structure
Opening the Structure of the New Academic Year
Checking National Curriculum Years
Adding New Year Groups19
Adding Classes (Registration Groups)21
Important Note on Editing Class Names
Changing Year Group Horizontal/Vertical Structures
Saving the Amended Pastoral Structure
Adding Intake/Admission Groups30
Adding One or More Admission Groups
Adding an Admission Group (Multiple Groups Not Enabled)33
Importing Admissions and Transfer Files (ATF)
Importing Common Transfer Files (CTFs)
Checking Dates for Part-Time Pupil/Students
Recording Leavers
Exporting Common Transfer Files (CTFs)
Setting up the Promotion Mapping for the New Academic Year41
Viewing/Setting the Promotion Path for Individual
Pupil/Students
Checking the Registration Tutors Assigned
Changing the Status of Applications to Offered or Accepted . 48

Adding Leaving Dates for Existing Staff Members in Personnel52
Allocating Applicants to Registration Groups/Classes
Printing Class (Registration Group) Lists for the New Academic Year
02  Processes to be Carried Out in Other SIMS Modules 59
In SIMS Attendance - Entering Reasons for Absence Last Year 59
Academic Management (Primary Curriculum) End of Year Processes
Dinner Money61
Meal Charges Mapping61
After the New Academic Year has Started62
Admitting Applicants62
Re-Admitting Pupil/Students65
In SIMS Attendance - Printing the Official Register for July 66
In SIMS Attendance - Using the Part-Time Pupil/Students Routine to Add Not Required Codes
Running Housekeeping Routines in SIMS68
Importing the Key Stage Wizard68
SIMS Learning Gateway69
In SIMS Attendance - Printing OMR Registration Sheets for the First Week of Term70

# **01** Setting Up the New Academic Year

Overview	.1
Setting Permissions	.1
Where to Find More Information	
End of Year Procedure Check List	
Recording Changes to Teaching Staff in Personnel	
Creating the New Academic Year	
Setting up the New Academic Year's Pastoral Structure	

### **Overview**

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

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

## **Setting Permissions**

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

## **Where to Find More Information**

Release notes for previous releases can be obtained by clicking the appropriate menu link on the Home page of our SOLUS website (<u>http://www.capitaes.co.uk/solus</u>).

All handbooks referred to throughout this document can be obtained from any of the following locations:

 The Documentation button on the Home Page in SIMS. Once open, click the Handbooks button, select the required category then click the required handbook.

### **End of Year Procedure Check List**

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

Complete	Description/Task
	Record changes to teaching staff in Personnel (please see <i>Recording Changes to Teaching Staff in Personnel</i> on page 4).
	Create the new academic year (please see <i>Creating the New Academic Year</i> on page 6).
	Set up the pastoral structure for the new academic year (please see <i>Setting up the New Academic Year's Pastoral Structure</i> on page 17).
	Add intake and admission groups (please see <i>Adding Intake/Admission Groups</i> on page <i>30</i> ).
	Import Admissions and Transfer Files (please see <i>Importing Admissions and Transfer Files (ATF)</i> on page 33).
	Import Common Transfer Files (please see <i>Importing Common Transfer Files (CTFs)</i> on page <i>34</i> ).
	Check dates for part-time pupil/students (please see <i>Checking Dates for Part-Time Pupil/Students</i> on page <i>35</i> ).
	Record leavers (please see <i>Recording Leavers</i> on page 37).
	Export Common Transfer Files (please see <i>Exporting Common Transfer Files (CTFs)</i> on page <i>39</i> ).

Complete	Description/Task
	Set up the promotion mapping for the new academic year (please see Setting up the Promotion Mapping for the New Academic Year on page 41).
	Change the status of applications (please see <i>Changing the Status of Applications to Offered or Accepted</i> on page 48).
	Allocate applicants to registration group/classes (please see <i>Allocating Applicants to Registration Groups/Classes</i> on page <i>53</i> ).
	Print class/registration group lists for the new academic year (please see <i>Printing Class (Registration Group) Lists for the New Academic Year</i> on page 56).
	Print OMR registration sheets for the first week of term (please see <i>In SIMS Attendance - Printing OMR Registration Sheets for the First Week of Term</i> on page 70).
	Enter reasons for absence last year (please see In SIMS Attendance - Entering Reasons for Absence Last Year on page 59).
	Map meal charges (please see <i>Meal Charges Mapping</i> on page 61).
	SIMS Learning Gateway (please see SIMS Learning Gateway on page 69).

## **Routines for After the New Academic Year has Started**

Complete	Description/Task
	Admit applicants (please see Admitting Applicants on page 62).
	Re-admit pupil/students (please see <i>Re-Admitting Pupil/Students</i> on page 65).
	Print the official register for July (please see In SIMS Attendance - Printing the Official Register for July on page 66).
	Add 'Not Required' codes (please see <i>In SIMS Attendance - Using the Part-Time Pupil/Students Routine to Add Not Required Codes</i> on page 67).
	Run housekeeping routines (please see <i>Running Housekeeping Routines in SIMS</i> on page 68).

## **Recording Changes to Teaching Staff in Personnel**

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

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

#### **Adding New Teachers to Personnel**

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

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

Add Employee			
Basic Details Surname	Davis	Forename	George
Gender	Male 👻	Date of Birth	21/08/1969
			Continue 🥥

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



Calendar button

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

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

p <b>loyee Details : Adrian Bla</b> Save boot boot boot boot boot boot boot boo									
	Suspens	-							
ployment Details		e							1
1 Employment Details									
Feaching Staff				Teach	ner Numb	ber	60/55916		
Feacher Category	Qualified T	eacher		- Qualit	fied Tead	cher Status	Grad Teacher Program (trained in		rained in El 👻
Staff Code	AB			Emplo	yee/Pay	roll No.			
Employment Dates	Employme	ent Start Lear	ving Date	Cont Servic	e Start	LA Start	Previous Employer	Next	New
	01/09/19	87		01/09/198	2	01/09/1985	Brookside Comm		🔁 Open
									💥 Delete
	•							F.	
Check	Check		Clearance	Date	Clearar	nce Level			New
	DBS Che	ck	03/09/201	3	Enhand	ced Clearance			🗇 Open
	Health Ch		12/12/200		Satisfa	-			💥 Delete
	List 99		03/06/200	2	List 99	Cleared			
_									
Contract	Status	Start Date	Post		Service		Scale Point		New
	<b></b>	01/09/2000	Headte	eacher	Leader	ship	27		C Open
									X Delete
									Clone
ervice Agreement	Start Date		End Date		Agree	ement Hours/W	/eek		New
									🗇 Open
									💥 Delete

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

NOTE: It is important to identify teachers by selecting this check box as it ensures teachers are included in all applicable returns.

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

- 14. Add a record for a **DBS Check** in the **Check** panel by clicking the **New** button and selecting from the **Check** drop-down list. Enter the date clearance was received (**Clearance Date**) or click the **Calendar** button to select the required date.
- 15. Add a record for a **Health Check** in the **Check** panel by clicking the **New** button and selecting from the **Check** drop-down list. Enter the date that the questionnaire was returned (**Clearance Date**) or click the **Calendar** button to select the required date.
- 16. Record any additional checks, if required.
- 17. Click the **Save** button to add the member of staff. Repeat for any other members of staff joining the school.



## **Creating the New Academic Year**

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

#### **IMPORTANT NOTES:**

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

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

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

For example, if the academic year starts on 05/09/2016 then an end date of 04/09/2017 is automatically supplied.

The first day of term should be specified even if pupil/students are not in attendance.

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

Promotion into new year groups, etc. occurs automatically on the first day of the first term of the new academic year (providing that the promotion process has been carried out). Before proceeding, please check that you have carried out the following:

- Recorded any changes to teaching staff (adding any new teachers and dates of leaving for any leavers).
- Ensured that you have the new academic year term dates, training days, etc. to hand.
- 1. Select Routines | School | Academic Year to display the Create Academic Year wizard.



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

#### **Defining the School Working Week**

Specify the school working the school is open.	g week by selecting which day	ys or half days
First day of the school week:	Monday	]
Day of the week	AM Session	PM Session
Monday		
Tuesday	<b>V</b>	
Wednesday	$\checkmark$	
Thursday	$\checkmark$	
Friday	$\checkmark$	
Saturday		
Sunday		
o errors detected. Press 'Next' t	to continue	

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

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

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

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

#### **Defining School Terms**

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

С	reate Academic Ye	ar		? 🛃
		and term holidays for the pol terms start and end o	-	
s	chool Terms and Ho	lidays		
	School Term	Term Start Date	Term End Date	Term Holiday
Ø.	Autumn Term	05/09/2016	16/12/2016	Christmas Holiday
	Spring Term	03/01/2017	07/04/2017	Easter Holiday
	Summer Term	24/04/2017	25/07/2017	Summer Holiday
N	lo errors detected. P	ress 'Next' to continue		
	Add Term	Remove		
	Preview		< Back	Next > Cancel

1. Enter the dates for the Autumn, Spring and Summer terms by clicking in the applicable **Term Start Date** and **Term End Date** fields and entering the dates in dd/mm/yyyy format, or by selecting from the calendar.

*NOTE:* Schools that have more than three terms in their academic year need to add additional terms (please see Adding Additional School Terms on page 10).

8 Primary School End of Year Procedures for the academic year 2016/2017 (Detailed) - Word version

Alternatively, click in the date cell until a down arrow appears then click the arrow to display a calendar, from which the required date can be selected.

Create Academic Year	r	8	×		
Define the terms and term holidays for the academic year Define the school terms start and end dates.					
School Terms and Holi	days				
School Term	Term Start Date	Term End Date Term Holiday			
I Autumn Term	05/09/2016	16/12/2016 Christmas Holiday	(t)		
Spring Term	03/01/2017				
Summer Term	24/04/2017	28 29 30 1 2 3 4 Holiday			
No errors detected. Pre	ess 'Next' to continue	5       6       7       8       9       10       11         12       13       14       15       17       18         19       20       21       22       23       24       25         26       27       28       29       30       31       1         2       3       4       5       6       7       8	l		
Add Term	Remove	Today Clear			
Preview		< Back Next > Cance			

*NOTE:* You can overtype the name of the term in the **School Term** column if a different name is required.

- Each term has a default holiday displayed in the **Term Holiday** column. If required, select a different holiday from the drop-down list or manually enter a new holiday name.
- 3. Repeat this process for all the default terms displayed, selecting the applicable holiday for each term. Any errors are displayed in the lower section of the wizard and must be resolved before you can proceed.

С	reate Academic Yea	ır		? 🛃	3
		nd term holidays for t ol terms start and end o	-		
S	chool Terms and Hol	idays			
	School Term	Term Start Date	Term End Date	Term Holiday	
Ø.	Autumn Term	05/09/2016	16/12/2016	Christmas Holiday	1
	Spring Term	03/01/2017	07/04/2017	Easter Holiday	
	Summer Term	24/04/2017	25/07/2017	Summer Holiday	
N	lo errors detected. Pr	ess 'Next' to continue			1
	Add Term	Remove			
	Preview		< Back	Next > Cancel	

4. If you are happy with the default three school terms, click the **Next** button to display the **Define the half term holidays** page and proceed to *Defining Half Term Holidays*.

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

Create Academic Ye	ar		8 23	New Academic Year Preview
Define the half te	rm holidays		A COMON	Academic Year 2016/2017 Academic Year 2016/2017 Autumn Term 05/09/2016-16/12/20
Define the half information is o	term holidays, start a optional.	nd end date for every	y holiday. This	Christmas Holiday 17/12/2016-02/0 ⊕ -
				<ul> <li>Summer Term 24/04/2017-25/07/2</li> <li>Summer Holiday 26/07/2017-04/09</li> </ul>
Category	Start Date	End Date	Description	
Half-Term	22/10/2016	30/10/2016	Autumn half term	
Half-Term	18/02/2017	26/02/2017	Spring half term	
Half-Term	27/05/2017	04/06/2017	Summer half term	
No errors detected. P	Press 'Next' to continu	e		
Add Holiday	Remove			
Preview 🔽		< Back	t Next > Cancel	< •

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

#### **Adding Additional School Terms**

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

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

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

Term Details	<b>×</b>
School Term:	Autumn Term 👻
Term Start Date:	05/09/2016
Term End Date:	16/12/2016
Term Holiday:	Christmas Holiday 🛛 👻
	OK Cancel

2. Select the term name from the **School Term** drop-down list. If the required name does not exist, enter a name manually, e.g. Autumn Term.

3. Enter the **Term Start Date** and **Term End Date** in dd/mm/yyyy format. Alternatively, click the **Calendar** buttons and select the required dates from the calendars.



Calendar button

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

#### **Defining Half Term Holidays**

Holidays are created automatically for the dates in between the term dates entered. For example, if the Spring term ends on 03/04/2017 and the Summer term starts on the 15/04/2017, then it is assumed that the dates in between are holidays. In addition, you need to enter the dates for half-term holidays manually.

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

Create Academic Y	ear			? 💌
Define the half te	erm holidays			San.
Define the hal information is	f term holidays, start a optional.	nd end date for ever	y holiday. This	
Category	Start Date	End Date	Description	
No errors detected.	Press 'Next' to continue	ð		
Add Holiday	Remove			
Preview		< Bac	k Next >	Cancel

1. From the **Define the half term holidays** page, click the **Add Holiday** button to display the **Half Term Holiday Details** dialog.

Half Term Holiday Details		
Category	Half-Term 👻	
Start Date	22/10/2016	
End Date	30/10/2016	
Description	Autumn half term	
	OK Cancel	

- 2. Select **Half-Term** from the **Category** drop-down list.
- 3. Enter the **Start Date** and **End Date** for the half-term holiday in dd/mm/yyyy format. Alternatively, click the **Calendar** buttons and select the required dates from the calendars.
- 4. Enter a **Description** for the half-term holiday if required, such as **Autumn Half-Term**. This description appears in the School Diary.
- 5. Click the **OK** button to add the half-term holiday.
- 6. Repeat steps 1 to 5 for both the Spring and Summer half-term holidays.

	reate Academic \ Define the half t Define the ha information is	<b>erm holidays</b> If term holidays, start a	nd end date for ever	y holiday. This
	Category	Start Date	End Date	Description
۲	Half-Term	22/10/2016	30/10/2016	Autumn half term
	Half-Term	18/02/2017	26/02/2017	Spring half term
	Half-Term	27/05/2017	04/06/2017	Summer half term
N	o errors detected.	Press 'Next' to continu	e	
	Add Holiday	Remove		
	Preview		< Back	k Next > Cancel

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

#### **Defining Teacher Training Days**

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

Create Academic	Year		? 🗙
Define teacher This informa the School D	tion is optional at this	s stage and can be defined later via	
Category	Date	Description	
No errors detected	. Press 'Next' to conti	inue	
Add	Remove		
Preview		< Back Next	t > Cancel

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

New Teacher Training Day		
Category	Staff Training Day 🔹	
Date	03/10/2016	
Description	INSET 1	
OK Cancel		

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

Create Academic Year	Create Academic Year				
Define teacher training days This information is optional at this stage and can be defined later via the School Diary.					
Category	Date	Description			
Staff Training Day	03/10/2016	INSET 1			
No errors detected. Press					
Add Re	emove	< Back Next >	Cancel		
Fleview		< Dack Next >	Cancel		

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

#### **Defining Public Holidays**

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

Create Academic \	Create Academic Year			
Define public hol This informat the School Di	ion is optional at th	is stage and can be defined later via		
Category	Date	Description		
No errors detected.	Press 'Next' to con	tinue		
Add holiday	Remove			
Preview		< Back Nex	t> Cancel	

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

New Public Holiday		
Category	Bank Holiday 👻	
Date	14/04/2017	
Description	Good Friday	
	OK Cancel	

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

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

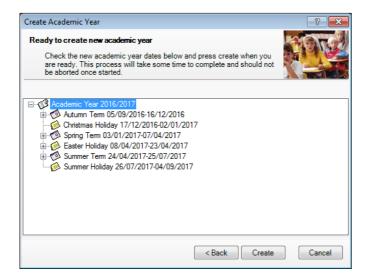
Create Academic Y	/ear	? 💌
Define public hol This informati the School Di	ion is optional at this st	tage and can be defined later via
Category	Date	Description
Bank Holiday	14/04/2017	Good Friday
Bank Holiday	17/04/2017	Easter Monday
Bank Holiday	01/05/2017	May Day
No errors detected.	Press 'Next' to continu	e
Add holiday	Remove	
Preview		< Back Next > Cancel

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

#### **Creating the New Academic Year**

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

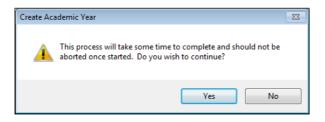
Please be aware that this process may take a long time because the system creates attendance records for the new year.



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

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

The following warning message is displayed:



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



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



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

Validate Memberships		
	Your group memberships are currently being checked and group membership rules enforced. This is to support the annual promotion process. Please wait	

Completed

## Setting up the New Academic Year's Pastoral Structure

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

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

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

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

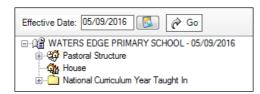
If you want teachers to be promoted with their pupil/students in the next academic year, this can be achieved as part of the pastoral promotion process (please see Setting up the Promotion Mapping for the New Academic Year on page 41).

If an additional year group is required, e.g. a Nursery has been introduced to the school, this should be added before admission groups are created to ensure that the new year group is available for selection (please see Adding Intake/Admission Groups on page 30).

#### **Opening the Structure of the New Academic Year**

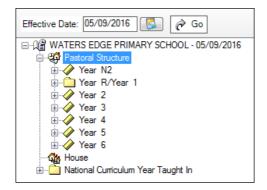
1. Select Focus | School | Pastoral Structure | Next Academic Year Structure to display the Next Academic Year Pastoral Structure page.

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



#### 01| Setting Up the New Academic Year

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



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

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

#### **Checking National Curriculum Years**

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

Year Group		? 🗙
Year Group National Curriculum Year	Curriculum Year 3	
Short Name:	3	
Full Name:	Year 3	
Head of Year		
Supervisors:	Role Name	
		Ok Cancel

#### **Adding New Year Groups**

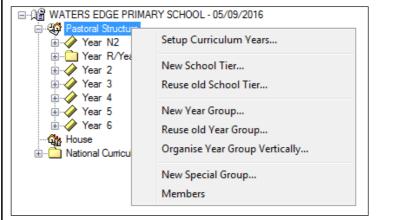
If an additional year group is required, e.g. a Nursery has been introduced to the school, this should be added before admission groups are created to ensure that the new year group is available for selection.

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

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

1. Select next year's pastoral structure (please see *Opening the Structure of the New Academic Year* on page *17*).

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



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

National Curriculum Year "Curriculum Year N1" does not have any Year Group attached

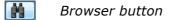
Error

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

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

Year Group		? 💌
Year Group National Curriculum Year	Curriculum Year N2	•
Short Name:	N2	
Full Name:	N2	
Head of Year		M X
Supervisors:	Role Name	
		Ok Cancel

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



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

SMIS Select person	? <mark>*</mark>
🍿 People Browse	
🖬 Search 🚍 Print	
Surname Forename Role	<any suitable=""> 👻</any>
Name	*
Avery, Mrs Helen	=
Bates, Miss Belinda	-
Boston, Mrs Sarah	
Boswell, Mrs Jennifer	
Brooks, Mr Carl	
Brown, Mrs Charmaine	
Brown, Mrs Pauline	
Brown, Mrs Susan	
Cable, Mrs Freda	
Chard, Mrs Vicky	-
	OK Cancel
Records found: 37	

20 Primary School End of Year Procedures for the academic year 2016/2017 (Detailed) - Word version

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

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

Supervisor Propertie	-	
Role:	Person:	
Supervisor	<ul> <li>Mrs Pauline Brown</li> </ul>	Q

New button

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

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

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

## Completed

#### Adding Classes (Registration Groups)

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

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

1. Select next year's pastoral structure (please see *Opening the Structure of the New Academic Year* on page *17*).

#### 01| Setting Up the New Academic Year

2. Expand the year group to which you wish to add the class by clicking the adjacent + icon.

B	MARY SCHOOL - 05/09/2016		
🚊 🥨 Pastoral Structure	🖃 🥨 Pastoral Structure		
🎚 🤣 Year N2			
ie ⊡ Year R/Year 1			
🕀 🏈 Year 2			
🕀 🖉 Year 3			
🕀 🕢 Year 4			
🗉 🧼 Year 5			
🖃 🤣 Year 6			
😥 Head of Year			
Registration Group			
්රු House	New Registration Group		
National Cur     Reuse old Registration Group			
Properties			
	Members		

3. Right-click the **Registration Group** folder and select **New Registration Group** from the pop-up menu to display the **Class** dialog.

Class			? 🔀
Class			
Short Name:	Rowan		
Full Name:	Rowan		
Registration Tutor	Mrs Paulin	ne Brown	M 💥
Supervisors:	Role	Name	
Room:			<u> </u>
			Ok Cancel

4. Enter a Short Name and Full Name for the new class.

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

sims Select person			? 🗾	x
ໜ People Browse				
🖬 Search 📥 Print				
Surname Fo	prename	Role	<any suitable=""></any>	·
Name				-
Avery, Mrs Helen				=
Bates, Miss Belinda				-
Boston, Mrs Sarah				
Boswell, Mrs Jennifer				
Brooks, Mr Carl				
Brown, Mrs Charmaine				
Brown, Mrs Pauline				
Brown, Mrs Susan				
Cable, Mrs Freda				
Chard, Mrs Vicky				Ŧ
			OK Cancel	
Records found: 37				

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

New bu	tton
--------	------

upervisor Properties			? 🛃
Supervisor Properties			
Role:	Person:		
Supervisor -	Mrs Pauline Brown		<u>a</u>
		Ok	Cancel

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

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

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

Room Brows	ser			×
🐜 Search Ro	oms			
M Search 📂 🕻	Open 💥 Delete		🚽 Links 👻 🥹 Help 💥 Clo	se
Short Name		Long Name		ocati
Short Name	Long Name		Establishment	*
11	11		WATERS EDGE PRIMARY SCHOOL	h
12	12		WATERS EDGE PRIMARY SCHOOL	Ξ
13	13		WATERS EDGE PRIMARY SCHOOL	
J1	J1		WATERS EDGE PRIMARY SCHOOL	
J2	J2		WATERS EDGE PRIMARY SCHOOL	
J3	J3		WATERS EDGE PRIMARY SCHOOL	Ŧ
•		III	4	
			OK Cancel	
Records four	nd: 11			

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



Adding Rooms tutorial in the SIMS Documentation Centre

Adding/Editing Rooms chapter in the Setting Up and Administering SIMS handbook



#### **Important Note on Editing Class Names**

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

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

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

#### Example 1:

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

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

In this circumstance, all you need to do is to create a new class, called **5AB** in the pastoral structure for the new academic year (e.g. 2016/2017) and set the promotion mapping to promote to this class at the start of the new academic year. All pupil/students in **4AB** will move up to **5AB** at the start of the new academic year (please see *Setting up the Promotion Mapping for the New Academic Year* on page *41*).

#### Example 2:

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

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

To correctly change a class name:

- 1. Add a new class (please see *Adding Classes (Registration Groups)* on page *21*) in the current pastoral structure (e.g. 2016/2017) labelled with the new class name (e.g. **4AW**).
- Delete the old class by right-clicking the required class name and selecting Remove from the pop-up menu to display the Remove Registration Group dialog.

Remove Registration	iroup 🔋 💌
Remove Registration	Group
reallocate members	removed when it has no members. You can to other groups manually or you can specify default ting members will be moved.
Destination Group:	•
	Ok Cancel

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

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

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

#### **Changing Year Group Horizontal/Vertical Structures**

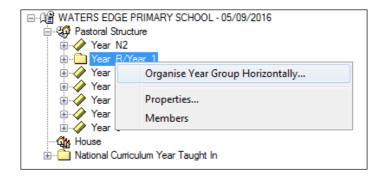
There may be occasions where you want the pastoral structure for the new academic year to be different to that of the current year. For example:

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

#### **Changing from a Vertical to a Horizontal Structure**

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

- 1. Select next year's pastoral structure (please see *Opening the Structure of the New Academic Year* on page 17).
- Expand the **Pastoral Structure** heading by clicking the + icon. Vertically organised year groups can be identified by their names, separated by a forward slash, e.g. **Nursery/Reception**.



26 Primary School End of Year Procedures for the academic year 2016/2017 (Detailed) - Word version

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

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

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

Organise Horizontally		? <mark>- x -</mark>
Organise Horizontally Class	Year Group	
ELM PINE ASH OAK	Year R Year 1	
	Ok	Cancel

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

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



#### 01| Setting Up the New Academic Year

6.

Organise Horizontally		? <mark>- x -</mark>
Organise Horizontally		
Class	Year Group	
	Year R	
	Ok	Cancel

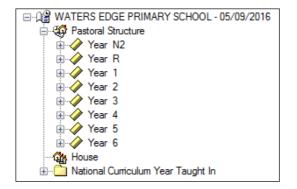
\_\_\_\_\_

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

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

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

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



#### Changing from a Horizontal to a Vertical Structure

This process may be required if, for example, your pupil/student numbers have decreased. This could allow previously separate years, such as Nursery and Reception (horizontally structured) to be merged into a single year (vertically structured) because there are insufficient pupil/students from the same year group to be taught in one class. 1. Select next year's pastoral structure (please see *Opening the Structure of the New Academic Year* on page *17*).

B-1 WATERS EDGE PRIMAR	Y SCHOOL - 05/09/2016
🗄 🥨 Pastoral Structure	
in vear N2 in vear R	Setup Curriculum Years
tear N ⊕ ✓ Year 1	New School Tier
⊕ vear 2 ⊕ vear 3	Reuse old School Tier
🕀 🏈 Year 4	New Year Group
⊕ vear 5 ⊕ Vear 6	Reuse old Year Group
House	Organise Year Group Vertically
ia 🔁 National Curricului	New Special Group
	Members

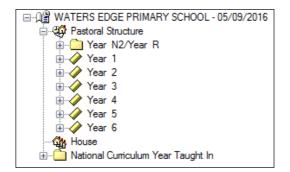
2. Right-click **Pastoral Structure** and select **Organise Year Group Vertically** from the pop-up menu to display the **Organise Vertically** dialog.

Organise Vertically
Organise Vertically Mark Year Group to organise them vertically:
Year 1 Year 2 Year 3 Year 4
Year 5 Year 6
Ok Cancel

3. Select the check boxes adjacent to the **Year N2** and **Year R** (Nursery and Reception years) you wish to merge into a vertical structure then click the **Ok** button. In the previous example, Nursery and Reception are being merged into a vertical structure.

#### 01| Setting Up the New Academic Year

4. Click the **Ok** button to merge the selected years, which are then displayed in the pastoral structure separated with a /, as shown in the following example.



#### Saving the Amended Pastoral Structure

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



#### Adding Intake/Admission Groups

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

**IMPORTANT NOTE:** Please ensure that the **Date of Admission** lies within the new academic year. We recommend that the date of admission is the day on which the applicants will actually arrive in school, i.e. not a teacher training day. However, please check with your Local Authority for advice on the correct date to use if you are unsure.

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

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

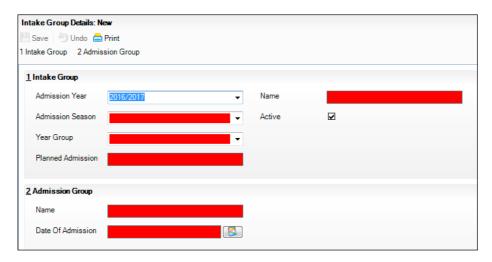
This is also a good time to delete or make inactive any unwanted admission groups. Detailed instructions on adding and maintaining admission groups can be found in the appropriate *Admissions* handbook.

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

🖹 New 🗰 Searc	h 🖆 Open 💥 Dele	te 🚍 Print 🚺 Browse	Next 合 P	revious					
Name Admission Year	2016/2017		ssion Season Group	<any></any>		, Status	Active		•
Name	2010/2017	Admission Year	Admission		Year Group	·	Planned Admission	Status	_
2016/2017 - Autun	n Year N2	2016/2017	Autumn		Year N2		20	Active	
2016/2017 - Autur	n Year R	2016/2017	Autumn		Year R		40	Active	

- 2. Carry out a search to ensure that the intake group does not already exist.
- 3. Click the **New** button to display the **Intake Group Details** page. Mandatory fields are highlighted in red. The page will look slightly different depending on whether you have set up SIMS to allow multiple admission groups to be added.

In addition, Own Admission Authority schools who have applied a Basic or Full Admissions Licence will see two additional fields (**Admission Policy** and **Numbers to Rank**).



- 4. In the **Intake Group** panel, select the **Admission Year** to which the intake group relates (e.g. 2016/2017) from the drop-down list (this defaults to the current academic year).
- 5. Select the required **Admission Season** (**Autumn**, **Spring** or **Summer**) or, if the intake group does not apply to a specific season, select **Integrated** from the drop-down list.

<u>1</u> Intake Group			
Admission Year	2016/2017 👻	Name	2016/2017 - Autumn Year N2
Admission Season	Autumn 👻	Active	
Year Group	Year N2 👻		
Planned Admission	20		

6. Select the required **Year Group** from the drop-down list.

- 7. Enter the number of applicants that you expect to admit to this intake group in the **Planned Admission** field.
- 8. Only Independent and Own Admission Authority Maintained schools with a Basic or Full Admissions Licence can select a previously defined admissions policy from the **Admission Policy** drop-down list. Select a policy, if required.
- 9. Independent and Own Admission Authority Maintained schools with a Basic or Full Admissions Licence can enter the number of applications that should be ranked in the **Numbers to Rank** field. By default, all applications in an intake are ranked. If you have agreed with your Local Authority that you will rank only a certain number of applications, enter the agreed number in this field.
- If you press the **Tab** key to move to the **Name** field or click in this field, a default name is supplied for the intake group, based on the **Admission** Year, Admission Season and Year Group, e.g. 2016/2017 Autumn
   Year N2. The default name can be amended, if required.
- 11. The **Active** check box is selected by default and indicates that the intake group is available for use. Deselect this check box only if you wish to create intake groups that will be used at some point in the future (they will not be displayed in the **Find Intake Group** browser by default).

#### **Adding One or More Admission Groups**

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

If SIMS is <u>not</u> set up to use multiple admission groups, please proceed to *Adding an Admission Group (Multiple Groups Not Enabled)*.

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

Add Admission Gr	oup		? 💌
Admission Group			
Name	Nursery - Autumn		
Date Of Admission	05/09/2016	 	
		ОК	Cancel

2. Enter a **Name** for the admission group together with the **Date Of Admission**. Alternatively, click the **Calendar** button and select the required date. **IMPORTANT NOTE:** Please ensure that the **Date Of Admission** falls within the applicable academic year. We recommend that the date of admission is the day that the children will actually arrive in school, i.e. not a teacher training day. However, if you are unsure please check with your Local Authority for advice on the correct date to use.

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

ame	Date Of Admission	New 📄
ursery - Autumn	05/09/2016	Copen
		💥 Delete

5. Click the **Save** button to create the intake and admission groups.

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

#### Adding an Admission Group (Multiple Groups Not Enabled)

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

2 Admission Group	
Name	2016/2017 - Autumn Year N2 (A)
Date Of Admission	05/09/2016

- 2. Enter the **Date Of Admission** for the group.
- 3. Click the **Save** button to create the intake and admission group.

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



#### Importing Admissions and Transfer Files (ATF)

If your Local Authority has provided you with an ATF file, this should have been imported around March time, as described in the appropriate *Admissions* handbook. Any additional pupil/students can be imported via CTF, as described in the following section.

#### Importing Common Transfer Files (CTFs)

This section provides a summary of the steps required to import a CTF.

Import any CTFs that have not yet been imported. Pupil/Students with CTFs can be imported into an admission group or directly on-roll.

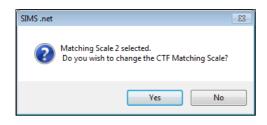
If any of the pupil/students in the CTF already exist in the system, any blank fields in their record are updated with data from the CTF. Any existing data is not overwritten, as it is deemed to be the most up-to-date information. Any such information is highlighted in the Exception Log that is displayed at the end of the import process.

Appropriate intake/admission groups must be created before you can import CTF files (please see *Adding Intake/Admission Groups* on page *30*).

1. Select **Routines | Data In | CTF | Import CTF** to display the **Select the CTF import type** dialog. This dialog varies, depending on your school phase.

Select the CTF import type
Import Type
General
Add Data for New Pupils Only
Add Data for Existing Pupils Only
Add KS1 for Existing Pupils Only
Add KS2 for Existing Pupils Only
Add Phonics Data for Existing Pupils Only
Select 🔀 Cancel

2. Highlight the required CTF import type then click the **Select** button to display a message asking you to confirm whether you wish to change the matching scale.



For detailed instruction on importing a CTF file and using the CTF Matching utility, please refer to the *Using the CTF Matching Screen* mini guide or to the *Importing and Exporting CTFs* chapter of the *Managing Pupil/Students* handbook.

Import CTF (General)							
1 Data to be Imported 2 In	nport Selection	3 Exception Log					
1 Data to be Imported							
Student Basic Details	s 🗹	Student Address	¥	Student Contacts	V	Looked After	V
SEN Information	¥	Assessment Data	✓	School History	$\checkmark$		
Attendance Summary	/ 🗹	Programme of Study(Pos Assessments	<sup>3)</sup> 🔽	FSM History	¥		
2 Import Selection							
CTF File							
Place new pupils in		✓ Effect	tive Date	21/03/2016			
Pre-Admission Gro	up	Admit On	Year Gro	up			
2016/2017 - Autu	mn Year N2 (A)	01/09/2016	Year N2	2			
2016/2017 - Autu	mn Year R (A)	01/09/2016	Year R				
						_	
						Proceed For Match	Import

- 3. In the **Data to be Imported** panel, indicate the data items you wish to import from the CTF by selecting the appropriate check boxes.
- 4. In the **Import Selection** panel, browse to the location of the CTF by clicking the **Open** button adjacent to the **CTF File** field to display the **Select Import File** dialog. Navigate to the required location, highlight the CTF then click the **Open** button to return to the **Import to CTF** page.
- 5. Select **Pre-Admission** from the **Place new pupils** in drop-down list to import the pupil/student into an admission group. The **On-roll** option is also available, but it is unlikely that September admissions would be imported directly on-roll.
- 6. Click the **Import CTF** button to start the import. Details of any errors are displayed in the Exception Log at the bottom of the **Import CTF** page.
- 7. Once you have finished importing the CTF, edit the details of the imported pupil/students as required.



#### **Checking Dates for Part-Time Pupil/Students**

To ensure that pupil/students who are no longer part-time are showing correctly in Attendance, it is necessary to enter an end date in their parttime details in SIMS and to change their attendance mode to all day. This is mostly relevant to Nursery schools (or schools with nursery age children). However, any pupil/student can be marked as part-time if their attendance is anything less than 10 sessions per week.

1. Select Focus | Pupil (or Student) | Pupil (or Student) Details then select the required pupil/student from the Find Student browser.

#### 01| Setting Up the New Academic Year

<u>Class</u>	PM		-	House							
Year Group	Year N2		•	Year 1	aught In			Curricu	ılum Yea	r N2	
Enrolment Status	Single Registra	tion	•	Board	er Status			Not a l	Boarder		
Admission Date	05/09/2016			Admis	sion Nun	nber		00146	5		
Former UPN				Attend	ance Mo	de		All day	,		
UPN	C82329991500	6	6	Local	UPN						
											🗙 Del
											💢 Dele
											History
Early Years Attendance	Start date	End date	Mon	Tue	Wed	Thu	Fri		Sat	Sun	
Early Years Attendance Patterns	Start date	End date	Mon	Tue	Wed	Thu	Fri		Sat	Sun	History

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

3. Check or amend the **End Date** in the **Part Time Details** table for any parttime pupil/students who will no longer be part-time, by clicking the **Open** button to display the **Edit Part-time Attendance** dialog.

SIMS Add Part-time	Attendance	
Start Date	05/09/2016	
End Date	31/12/2016	
	ОК	Cancel
		h.

- Add or edit the End Date as required then click the OK button. The End Date is then displayed in the Part Time Details table.
- 5. Select **All day** from the **Attendance Mode** drop-down list.
- 6. Click the **Save** button to save any changes.

Once you have determined which pupil/students are part-time (i.e. which pupil/students are AM only or PM only), you need to define the part-time sessions and dates for the AM/PM groups for all or part of the coming year. Running this routine will also ensure that pupil/students who are no longer part-time will have their attendance records amended accordingly (please see *In SIMS Attendance - Using the Part-Time Pupil/Students Routine to Add Not Required Codes* on page 67).



#### **Recording Leavers**

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

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

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

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

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

- 1. Select Routines | Pupil (or Student) | Leavers to display the Find Student(s) browser.
- 2. Search for the required pupil/student then double-click their name to display the **Manage Student(s) Leaving Details** page.
- 3. If you wish to assign a group of pupil/students as leavers, search on the appropriate **Year** or **Reg Group** by selecting from the appropriate drop-down lists. Highlight the required pupil/students using any of the following methods:
  - To select all the pupil/students displayed in the browser, select All from the Select drop-down menu.

🖆 Select 🔹
All
Selected

- To select a group of pupil/students, highlight them using any of the following methods:
  - Hold down the **Ctrl** key and click each pupil/student to be selected.
  - To highlight sequentially listed pupil/students, click the first name in the list, hold down the Shift key then click the last name in the list.
- Once the required pupil/students have been highlighted, click the **Select** button to add them to the **Students** panel.

The selected pupil/students are then transferred to the **Students** panel.

anage Pupil(s) Le	aving Details							
Save 📥 Print								
eaving Information	2 Students							
Leaving Informat	ion							
Date of Leaving	23/	07/2016		Reason for	leaving		-	Assign to
Destination after Le	aving						đ /	Assign to Select
Students								
Name	Year Group	Class	Adm. No.	Date of Admission	Date of Leaving	Reason for Leaving	Destination 🔺	Remove 🚥
Aaron, Chris	3	3CB	001102	01/09/2010				🔄 Clear
Amoso, Rosanna	6	6KH	001012	03/09/2008				
Amoso, Silv	6	6KH	001013	03/09/2008				
Amoso, Stephanie	6	6KH	001014	03/09/2008			=	
Andrews, Paul	6	6KH	000922	05/09/2007				
Atkinson, Ben	6	6KH	000923	05/09/2007				
Atkinson, Ben	6	6KH	000924	05/09/2007				
Baker, James	6	6KH	001016	03/09/2008				
Brown, Jeremy	6	6KH	000926	05/09/2007				
Buckley, Emma	6	6KH	000927	05/09/2007				
Cardy, Carly	6	6KH	001019	03/09/2008				
Carlin, Tayla	6	6KH	001020	03/09/2008				
Clarke, Jennifer	6	6KH	000931	05/09/2007				
Crosby, Kerry	6	6KH	000932	05/09/2007				
Daniels, Sally	6	6KH	001022	03/09/2008				
Douglas, David	6	6KH	000933	05/09/2007				
Elliott. Jordan	6	6KH	000935	05/09/2007			*	

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

#### **Exporting Common Transfer Files (CTFs)**

Common Transfer Files can be created and sent to other schools or Local Authorities.

*NOTE:* Before proceeding, you must have previously added any required **Feeder** and **Destination Schools** via **Tools | Other Schools** and specified the directory into which the CTF export will be saved via **Tools | Setups | CTF**.

*Please ensure that the relevant pupil/students are given a* **Date of** *Leaving before exporting the CTF.* 

This section provides a summary of the steps required to export a CTF.

1. Select Routines | Data Out | CTF | Export CTF to display the Select the CTF export type dialog.

Select th	ne CTF export type
Export	: Туре
Early 1	Years Foundation Stage data (FSP)
Gener	al
KS1	
KS1 e	xcluding Tests and Tasks
KS2	
Phonic	cs Test Results
	Select 🔀 Cancel

Highlight the required CTF export type then click the **Select** button to display the **Export CTF** page. The page name is appended with the option selected in the previous dialog. For detailed instruction on exporting a CTF file, please refer to the *Importing and Exporting CTFs* chapter of the *Managing Pupil/Students* handbook.

2. In the **Data to be Exported** panel, ensure that the check boxes relating to the data items you wish to export are selected.

Data to be Exported					
Student Basic Details	V	Student Address	V	Student Contacts	V
SEN Information	V	Assessment Data Include KS1 Tasks/Tests	<b>¥</b>	School History	V
Attendance Summary	V	Looked After	V	FSM History	V

3. Select the status of the pupil/students you wish to include in the CTF file from the **View** drop-down list (e.g. **Leavers this year**) in the **Student Options** panel.

2 Student Options				la da de de de la		_		
Effective Date	21/03/2016 🚺 View	Current students	•	already exported	¥	¢,	Refresh Students	

- 4. If you have already created a CTF file for some of the pupil/students but wish to include them in this CTF, select the check box to include pupil/students already exported in the export file.
- 5. Click the **Refresh Students** button to update the list of pupil/students displayed based on your selections. You can change the display order by clicking any of the column headings.
- 6. In most circumstances, a single year group will be selected, such as Year 6. This is achieved by selecting the required year from the **Year Grp** drop-down list as shown in the following graphic.

UPN	Preferred Surname	Preferred Forename	Reg Grp 🖵	Year Grp 🔻 🖵	Year Taught 📃	Previous Destination	Destination LA/Other	Destination School
B820200106090	Acton	Samantha	6VC	6	6			
Q820200106091	Amoso	Rosanna	бКН	6	6			
E820200106092	Amoso	Silv	бКН	6	6			
U820200106093	Amoso	Stephanie	бКН	6	6			
Y820200106001	Andrews	Paul	бКН	6	6			
H820200106094	Angler	Harry	6VC	6	6			
B820200106003	Atkinson	Ben	бКН	6	6			•
M820200106002	Atkinson	Ben	бКН	6	6		Avon (Pre Lgr)	<u>^</u>
X820200106095	Baker	James	бКН	6	6		Barking & Dagenham Barret	
Q820200106004	Bradbury	Christina	6VC	6	6		Bamsley	
L820200106096	Bradshaw	Jonn	6VC	6	6		Bath & North East Somerset Bedford Borough	*
E820200106005	Brown	Jeremy	6KH	6	6			

- 7. Select the **Destination LA/Other** or **Destination School** by clicking in the appropriate cell then selecting from the drop-down list. This can be done on an individual basis or you can select multiple pupil/students as follows:
  - Hold down the **Ctrl** key and click each pupil/student to be selected.
  - To highlight sequentially listed pupil/students, click the first name in the list, hold down the **Shift** key, then click the last name in the list.
  - To select all the pupil/students, right-click anywhere in the table then select **Select All** from the pop-up menu.

UPN	Preferred Surname	Preferred Forename	Reg Grp 👳	Year Grp 🔻 💂	Year Taught 🔍	Previous Destination	Destination LA/Other	Destination School
B820200106090	Acton	Samantha	6VC	6	6			
Q820200106091	Amoso	Rosanna	6KH	6	6			Select All
E820200106092	Amoso	Silv	6KH	6	6			
U820200106093	Amoso	Stephanie	6KH	6	6			
Y820200106001	Andrews	Paul	6KH	6	6			
H820200106094	Angler	Harry	6VC	6	6			
B820200106003	Atkinson	Ben	6KH	6	6			
M820200106002	Atkinson	Ben	6KH	6	6			
X820200106095	Baker	James	6KH	6	6			
Q820200106004	Bradbury	Christina	6VC	6	6			
L820200106096	Bradshaw	Jonn	6VC	6	6			
E820200106005	Brown	Jeremy	6KH	6	6			

8. Click the **Export CTF** button to create the export file.

After the file has been created, any errors are displayed in the **Exception Log** panel, together with the number of pupil/students in the file, the number processed and the number not exported.

				_				
UPN	Preferred Sumame	Preferred Forename	Gender	Date of Birth	Error Description	File Name	<b>^</b>	Save
L820200106096	Bradshaw	Jonn	М	02/02/2004	No ENG Results exported since ther	8232999_CTF_8234321_006		Print
L820200106096	Bradshaw	Jonn	М	02/02/2004	No ENG Results exported since ther	8232999_CTF_8234321_006		
A820200106097	Bukolt	Krystal	F	05/09/2003	No ENG Results exported since ther	8232999_CTF_8234321_006	E	
A820200106097	Bukolt	Krystal	F	05/09/2003	No ENG Results exported since ther	8232999_CTF_8234321_006		
A820200106097	Bukolt	Krystal	F	05/09/2003	No ENG Results exported since ther	8232999_CTF_8234321_006		
P820200106098	Cardy	Carly	F	11/11/2003	The 9th point for FSP PSE AS2 has	8232999_CTF_8234321_006		
A820200106012	Douglas	David	М	05/02/2004	The 9th point for FSP PSE AS2 has	8232999_CTF_8234321_006		
F820200106106	Gorman	Michael	М	02/03/2004	The 9th point for FSP PSE AS3 has	8232999_CTF_8234321_006		
G820200106016	Graham	Elaine	F	12/11/2003	The 9th point for FSP PSE AS1 has	8232999 CTF 8234321 006	-	

Any errors must be corrected before the pupil/student can be successfully included in the CTF export file.

9. Navigate to the location of the CTF Export Directory (as defined in Tools | Setups | CTF) then identify the newly created XML file for export. The CTF can be transferred by a local secure file transfer mechanism, such as School to School (<u>http://teachernet.gov.uk/S2S</u>). Please contact your Local Authority if you are unsure how to transfer the CTF.



#### Setting up the Promotion Mapping for the New Academic Year

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

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

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

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

• Recorded any changes to teaching staff (added new teachers and added dates of leaving for any leavers).

• Created the new academic year.

• Amended your pastoral structure as required, such as adding new classes.

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

Promotic	n Data Check
?	Before promoting pastoral groups the system must prepare your student data
1	This may take a few minutes.
	Ok Cancel

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



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

demic Year					
mote from		mic Year 2015/2016			- Load
r Group	_				
Year Group		Pro	motion Path		
					Set Defa
erride memb	ershin 🗌				
erride memb	ership 🗌				Ser Dela
s					
s	ership Registration Group	Promotion Path	Supervisor	Promote Registration Tutor	Promote Other Supervisors
s	Registration	Promotion Path	Supervisor	Registration	Promote Other
s	Registration	Promotion Path	Supervisor	Registration	Promote Other
erride memb <b>ss</b> Year	Registration	Promotion Path	Supervisor	Registration	Promote Other
s	Registration	Promotion Path	Supervisor	Registration	Promote Other
s	Registration	Promotion Path	Supervisor	Registration	Promote Other
s	Registration	Promotion Path	Supervisor	Registration	Promote Other
is Tear	Registration Group	Promotion Path	Supervisor	Registration	Promote Other
s	Registration Group	Promotion Path	Supervisor	Registration	Promote Other

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

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

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

cademic Year:						
Promote from	Acader	mic Year 2015/2016			▼ Load	
ear Group						
Year Group		Pror	motion Path			
N2		R			•	
R		1			•	E
1		2				
2		3			Ī	
3		4			Ā	-
	Registration	Promotion Path	Registration Tutor	Promote	Promote Other	
l <b>ass</b> Year	Registration Group	Promotion Path	Registration Tutor	Promote Registration Tutor	Promote Other Supervisors	ŕ
			Registration Tutor	Registration		
Year	Group		-	Registration Tutor	Supervisors	
Year Year N2	Group PM AM		Ms Lisa Lawson	Registration Tutor	Supervisors	
Year Year N2 Year N2	Group PM AM ELM		Ms Lisa Lawson Mrs Rebecca Lorrin	Registration Tutor	Supervisors	
Year N2 Year N2 Year N2 Year R/Yea.	Grõup PM AM ELM PINE		Ms Lisa Lawson Mrs Rebecca Lorrin Mr Richard Perrin	Registration Tutor	Supervisors	
<ul> <li>Year N2</li> <li>Year N2</li> <li>Year R/Yea</li> <li>Year R/Yea</li> </ul>	Grõup PM AM ELM PINE ASH		Ms Lisa Lawson Mrs Rebecca Lorrin Mr Richard Perrin Mr Oliver Joyner	Registration Tutor	Supervisors	×
Year N2 Year N2 Year N2 Year R/Yea Year R/Yea Year R/Yea	Grõup PM AM ELM PINE ASH OAK		Ms Lisa Lawson Mrs Rebecca Lorrin Mr Richard Perrin Mr Oliver Joyner Miss Amelia Kent	Registration Tutor	Supervisors	-

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

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

Year		Registration Group	Promotion Path	Registration Tutor	Promote Registration Tutor	Promote Other Supervisors	
Year	N2	PM		Ms Lisa Lawson			-
Year	N2	AM		<ul> <li>Mrs Rebecca Lorrin</li> </ul>			
Year	R/Yea	ELM	2JB	<ul> <li>Mr Richard Perrin</li> </ul>			
Year	R/Yea	PINE	2GH	Mr Oliver Joyner			
Year	R/Yea	ASH	2JB	Miss Amelia Kent			
Year	R/Yea	OAK	2GH	Miss Shirley Fortune			

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

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

- 8. If any existing Classroom Assistants or Learning Support Assistants should be promoted into the next academic year with the class, select the **Promote Other Supervisors** check box.
- 9. Select the **Override Membership** check box in both the **Year Group** and **Class** panels the first time you carry out the promotion mapping process.

This ensures that any existing memberships (however they were defined) are overwritten. If you repeat the promotion process, you can decide whether to overwrite the existing memberships by selecting the check box as required. For example, if you had originally stated that pupil/students in the **Pine** class should be promoted to the **Ash** class and subsequently wanted them to go from **Pine** to **Oak**, you would need to select the **Override Membership** check box in the **Class** panel.

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

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

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

Name	Unusual	Current Year Group	Next Year Group	Current Registration Group	Next Registration Group
Current Year Group: N	12				
Current Year Group: F	2				
Current Year Group: 1	l				
Current Year Group: 2	2				
Current Year Group: 3	}				
Current Year Group: 4	ţ				
Current Year Group: 5	5				
E Current Year Group: 6	;				

#### Viewing/Setting the Promotion Path for Individual Pupil/Students

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

Na	ame	Unusual	Current Year Group	Next Year Group	Current Registration Group	Next Registration Group
÷	Current Year Group: N2					
÷	Current Year Group: R					
+	Current Year Group: 1					
Ξ	Current Year Group: 2					
	Adams, Laura		2	3	2JB	3TO
	Amnar, Tarak		2	3	2JB	3TO
	Astwick, Gwenneth		2	3	2JB	3TO
	Bond, Steve		2	3	2JB	3TO
	Cameron, Zara		2	3	2GH	3CB
Ø.	Carter, Hannah					3TO 🖣
	Churchill, Martin		2	3	2JB	M Short Name
	Cookson, Harry		2	3	2JB	3TO
	Cosenza, Isabella		2	3	2JB	3CB
	Defeo, Lorenzo		2	3	2JB	x //
	Dennis, Tommy		2	3	2GH	3CB
	Dixon, Stephanie		2	3	2JB	3TO
	D Fut O		0	-	0.10	170

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

Sort	×
Sort students by Name	<ul> <li>Ascending</li> <li>Descending</li> </ul>
Then by Current Year Group	<ul> <li>Ascending</li> <li>Descending</li> </ul>
Then by (none)	<ul> <li>Ascending</li> <li>Descending</li> </ul>
Then by (none)	<ul> <li>Ascending</li> <li>Descending</li> </ul>
Ok Can	cel Clear All

#### 01| Setting Up the New Academic Year

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

Group By
Group students by
Next Year Group 👻
Then by
(none)
Then by
(none) 👻
Then by
(none) 👻
Ok Cancel Clear All

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

Custon	nize Columns		×
Colu	mas		
	Show Column	Column Name	
		Unusual	
		Current Year Group	
		Next Year Group	
		Current Registration Group	
		Next Registration Group	
		Current National Curriculum Year	
		Next National Curriculum Year	
		Ok Cance	el 📄

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

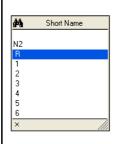
Multiple pupil/students can be highlighted using any of the following methods:

Adams, Laura	2	3	2JB	3TO
Amnar, Tarak	2	3	2JB	3TO
Astwick, Gwenneth	2	3	2JB	3TO
Bond, Steve			2JB	зто
Cameron, Zara	2	3	2GH	3CB
Carter, Hannah			2JB	зто
Churchill, Martin			2JB	зто
Cookson, Harry	2	3	2JB	ЗТО
Cosenza, Isabella			2JB	зто
Defeo, Lorenzo	2	3	2JB	3TO
Dennis, Tommy	2	3	2GH	ЗСВ
Dixon, Stephanie	2	3	2JB	зто

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

 To highlight sequentially listed pupil/students, click the first name in the list, hold down the **Shift** key then click the last name in the list.

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



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

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

Completed

#### **Checking the Registration Tutors Assigned**

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

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

Completed

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

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

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

This section assumes that you have added all of the required applicants via **Focus | Admission | Application**, and that you have imported via CTF or ATF.

#### **Finalising Offers**

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

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

Name		Adn	mission Season	<any></any>	•	Status	Active	
Admission Year	2016/2017	✓ Yea	ar Group	<any></any>	-			
lame		Admission Year	Admission	Season	Year Group		Planned Admission	Status
2016/2017 - Autur	nn Year N2	2016/2017	Autumn		Year N2		20	Active
016/2017 - Autur	nn Year R	2016/2017	Autumn		Year R		40	Active

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

a 1/2	fers - 2016/2017 - Autumn Year						
ummary	2 Applications						
Summary							
Planned Ac	dmission 20	Offe	red	0			
Total Appli	cants 11	Acce	epted	0			
Applied	11	With	drawn	0			
		Adm	ittad	0			
		Reje	ected	0			
Applicatio	ons						
		Candar	DOB	And Chatra	AE-d	Officered	Printed
	Name	Gender	DOB 31/08/2010	App. Status	Applied	Offered	Rejected
	Name Adams, Adam	Gender Male Male	DOB 31/08/2010 21/08/2011	Applied	Applied	Offered	Rejected
Late	Name	Male	31/08/2010	Applied Applied	×	Offered	Rejected
Late	Name Adams, Adam Baggley, Chris	Male Male	31/08/2010 21/08/2011	Applied	✓ ✓	Offered	Rejected
Late	Name Adams, Adam Baggley, Chris Cadilia, Celia	Male Male Female	31/08/2010 21/08/2011 07/05/2011	Applied Applied Applied		Offered	Rejected
Late	Name Adams, Adam Baggley, Chris Cadilia, Celia Dahl, Nashkabir	Male Male Female Female	31/08/2010 21/08/2011 07/05/2011 30/06/2011	Applied Applied Applied Applied		Offered	Rejected
Late	<ul> <li>Name</li> <li>Adams, Adam</li> <li>Baggley, Chris</li> <li>Cadilia, Celia</li> <li>Dahl, Nashkabir</li> <li>Eagle, Ruby</li> </ul>	Male Male Female Female Female	31/08/2010 21/08/2011 07/05/2011 30/06/2011 20/03/2011	Applied Applied Applied Applied Applied		Offered	Rejected
Late	Name Adams, Adam Baggley, Chris Cadila, Celia Dahl, Nashkabir Eagle, Ruby Falmer, Katie-May	Male Male Female Female Female Female	31/08/2010 21/08/2011 07/05/2011 30/06/2011 20/03/2011 12/06/2011	Applied Applied Applied Applied Applied Applied		Offered 	Rejected
Late	Adams, Adam Adams, Adam Baggley, Chris Cadila, Celia Dahl, Nashkabir Eagle, Ruby Fahrer, Kaite-May Gardener, Harry	Male Male Female Female Female Female Male	31/08/2010 21/08/2011 07/05/2011 30/06/2011 20/03/2011 12/06/2011 14/02/2011	Applied Applied Applied Applied Applied Applied Applied		Offered	Rejected
	Name       Adams, Adam       Baggley, Chris       Cadila, Cella       Dahl, Nashkabir       Eagle, Ruby       Falmer, Kaite/May       Gardener, Hany       Hacket, Charlie	Male Male Female Female Female Female Male Male	31/08/2010 21/08/2011 07/05/2011 30/06/2011 20/03/2011 12/06/2011 14/02/2011 13/12/2011	Applied Applied Applied Applied Applied Applied Applied Applied		Offered  Offered  Offered	Rejected

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

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

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

#### 01| Setting Up the New Academic Year

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

	Offers - 2016/2017 - Autumn Year	R					
Save	🔄 Undo  📥 Print						
ummary	2 Applications						
_							
Summa							
Planned Admission 20		Offe	ered	0			
Total App	plicants 11	Acc	epted	0			
Applied	11	With	ndrawn	0			
		۸da	nitted	0			
		Reje	ected	0			
Applica	ations						
	ations ate Name	Gender	DOB	App, Status	Applied	Offered	Rejected
		Gender Male	DOB 31/08/2010	App. Status Applied	Applied	Offered	Rejected
La	ate Name					Offered	Rejected
La	ate Name Adams, Adam	Male	31/08/2010	Applied			Rejected
La	ate Name Adams, Adam Baggley, Chris	Male Male	31/08/2010 21/08/2011	Applied Applied		✓ ×	Rejected
La	ate Name Adams, Adam Baggley, Chris Cadilia, Celia	Male Male Female	31/08/2010 21/08/2011 07/05/2011	Applied Applied Applied		· · · · · · · · · · · · · · · · · · ·	Rejected
La	ate Name Adams, Adam Baggley, Chris Cadilia, Celia Dahl, Nashkabir	Male Male Female Female	31/08/2010 21/08/2011 07/05/2011 30/06/2011	Applied Applied Applied Applied			Rejected
	ate Name Adams, Adam Baggley, Chris Cadilia, Celia Dahl, Nashkabir Eagle, Ruby	Male Male Female Female Female	31/08/2010 21/08/2011 07/05/2011 30/06/2011 20/03/2011	Applied Applied Applied Applied Applied			
	Name           Adams, Adam           Baggley, Chris           Cadila, Celia           Dahl, Nashkabir           Eagle, Ruby           Falmer, Katie-May	Male Male Female Female Female Female	31/08/2010 21/08/2011 07/05/2011 30/06/2011 20/03/2011 12/06/2011	Applied Applied Applied Applied Applied Applied			
	ate Name Adams, Adam Baggley, Chris Cadiia, Celia Cadiia, Celia Cadiia, Celia Cadiia, Celia Cadiia, Chia Eagle, Ruby Falmer, Katie-May Gardener, Harry	Male Male Female Female Female Female Male	31/08/2010 21/08/2011 07/05/2011 30/06/2011 20/03/2011 12/06/2011 14/02/2011	Applied Applied Applied Applied Applied Applied Applied			
	ate Name Adams, Adam Baggley, Chris Cadilia, Celia Dahl, Nashkabir Eagle, Ruby Falmer, Katie-May Gardener, Harry Hacket, Charlie	Male Male Female Female Female Female Male Male	31/08/2010 21/08/2011 07/05/2011 30/06/2011 20/03/2011 12/06/2011 14/02/2011 13/12/2011	Applied Applied Applied Applied Applied Applied Applied Applied			

#### **Accepting Applicants**

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

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

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

Name Admission Year 2016/2017   Name Admission Yei		Admission		<any></any>	•	, Status	Active	
		✓ Year (	•		<any> 💌</any>			
		Admission Year			Year Group		Planned Admission	Status
2016/2017 - Autumn	Year N2	2016/2017	Autumn		Year N2		20	Active
2016/2017 - Autumn	Year R	2016/2017	Autumn		Year R		40	Active

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

Accept/De	cline Applications - 2016/2017 -	Autumn Year R					
Save	🕤 Undo  📥 Print						
1 Summary	2 Applications						
<u>1</u> Summa	ry						
	Planned Admission 20	<i>µ</i>	Accepted 0				
	Total Applicants 11	N	Vithdrawn 0				
	Applied 3	F	Rejected 1				
	Offered 7	/	Admitted 0				
2 Applica	tions						
Current A	oplication Status Offered	•					
Name		Gender	DOB	Application Status	Offered	Accepted	Withdrawal
	Baggley, Cl	nris Male	21/08/2010	) Offered	×		
	Cadilia, Ce	lia Female	07/05/2010	) Offered	✓		
	Dahl, Nashka	bir Female	30/06/2010	) Offered	✓		
	Eagle, Ru	by Female	20/03/2010	) Offered	✓		
	Hacket, Cha	lie Male	13/12/2010	) Offered			
	Idle, Dy	an Male	08/03/2010	) Offered	✓		
	Jack, Jess	ca Female	01/09/2010	) Offered	✓		

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

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

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

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

	🕽 Undo 📥 Print						
ummary	2 Applications						
Summary	,						
	Planned Admission 20		Accepted 0				
	Total Applicants 11		Withdrawn 0				
	Applied 3		Rejected 1				
	Offered 7		Admitted 0				
	oplication Status Offered	•					
	·	Carada	DOD	Ann Franking Chabas	0."	[A	Section and the second
Name		Gender	DOB	Application Status	Offered	Accepted	Withdrawal
	Baggley,	Chris Ma	le 21/08/201	Accepted		Accepted	Withdrawal
	Baggley, Cadilia,	Chris Ma Celia Femal	le 21/08/201	Accepted Accepted		1	Withdrawal
	Baggley, Cadilia, Dahl, Nast	Chris Ma Celia Femal kabir Femal	le 21/08/2011 le 07/05/2011 le 30/06/2011	Accepted Accepted Accepted		✓ ✓	Withdrawal
	Baggley, Cadilia,	Chris Ma Celia Femal kabir Femal Ruby Femal	le 21/08/2011 e 07/05/2011 e 30/06/2011 e 20/03/2011	Accepted Accepted Accepted Accepted		✓ ✓	Withdrawal
	Baggley, Cadila, Dahl, Nas Eagle,	Chris Ma Celia Femal kabir Femal Ruby Femal narlie Ma	e 21/08/2011 e 07/05/2011 e 30/06/2011 e 20/03/2011 e 13/12/2011	Accepted           Accepted           Accepted           Accepted           O           Accepted           Accepted           Accepted           Accepted           Accepted	· · · · · · · · · · · · · · · · · · ·	¥ ¥	Withdrawal

4. If you wish to accept applicants with a status of **Applied**, select **Applied** from the **Current Application Status** drop-down list and follow this same process.

#### 01| Setting Up the New Academic Year

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



#### Adding Leaving Dates for Existing Staff Members in Personnel

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

- 1. Select Focus | Person | Staff to display the Find Employee browser.
- 2. Search for and then select the required member of staff to display their details on the **Employee Details** page.
- 3. Click the **Employment Details** tab to display the **Employment Details** panel.
- 4. In the **Employment Dates** table, highlight the required record then click the **Open** button to display the **Edit Employment History** dialog.

Edit Employment History for He	elen Avery
Details	
Employment Start Date	01/09/2009
Date of Leaving	31/08/2016
Continuous Service Start Date	01/09/2009
Local Authority Start Date	01/09/2009
Previous Employer	
Next Employer	
Notes	
	OK Cancel

5. Enter the **Date of Leaving** in dd/mm/yyyy format or click the **Calendar** button and select the required date.

HA Employr 01/09/2		En Baving Date Cont Se 1/08/2016 01/09/7	alified Teacher Status nployee/Payroll No. ervice Start LA Start 2009 01/09/2009	Grad Teacher Pr		trained in El
Employr 01/09/2		eaving Date Cont Se 1/08/2016 01/09/7	ervice Start LA Start	Previous Employer	Next	
01/09/2		1/08/2016 01/09/2		Previous Employer	Next	
•	2009 3		2009 01/09/2009			🔁 Open
						💥 Delete
~ .					P.	
Check Clearance Da			Clearance Level			New
DBS CH	leck	06/09/2013	with List Checks		🔁 Open	
131 55		20/00/2000	Lat 00 Globalda			💥 Delete
Status	Start Date	Post	Service Term	Scale Point		New
<b>2</b>	01/09/2011	Midday Supervisor	NJC - APT & C Staff	11.0		🔁 Open
x	07/09/1993	Midday Supervisor	Manual Staff	1.0		💥 Delete
						Clone
Start Da	te	End Date	End Date Agreement Hours/W			New
						🗇 Open
						💥 Delete
	×	Status Start Date	Status     Start Date     Post       Image: Control of the state	Status     Start Date     Post     Service Term       Image: Comparison of the state of the sta	Status     Start Date     Post     Service Term     Scale Point       Image: Comparison of the state of the stat	Status     Start Date     Post     Service Term     Scale Point       Image: Constraint of the state of the stat

6. Click the **OK** button to return to the **Employee Details** page.

7. Click the **Save** button to save the changes. Repeat for any other leavers.



#### Allocating Applicants to Registration Groups/Classes

Before allocating applicants to classes, you must have:

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



Application icon

- changed the applicant's application status (please see *Changing the* Status of Applications to Offered or Accepted on page 48) to Offered or Accepted.
- 1. Select Focus | School | Pastoral Structure | Next Academic Year Structure to display the Next Academic Year Pastoral Structure page.

The **Effective Date** defaults to the start date of the next academic year. Whilst it is possible to change this date to view information, the default date must be used in order to edit information. 2. Expand the **Pastoral Structure** until the **Registration Group** folder is visible under the required year.



3. Right-click the applicable **Registration Group** folder and select **Members** from the pop-up menu to display the **Allocate Students/Applicants** dialog.

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

S Allocate Students/	Applicants	: Year N2				
Effective Date Range		end of the aca	demic year (		0	Over the whole academic year ( 05/09/2016 - 04/09/2017 )
Students	Ŀ	Accepted	Applications		¥	Current Applications (Applied / Offered / Reserved)
Members						Print 🆓 Actions 👻
Name	Gender	Year Group	Reg Group	РМ	АМ	· · · · · · · · · · · · · · · · · · ·
Abhra, Abjit	Male	Year N2	АМ		$\checkmark$	
Abhra, Alisha	Female	Year N2	PM	~		E
Abhra, Neel	Male	Year N2	PM	✓		
Ackton, Stan	Male	Year N2	AM		✓	
Beiber, Justin	Male	Year N2	AM		$\checkmark$	
Berkley, Jack	Male	Year N2	PM	✓		
Del Sonno, Nadia	Female	Year N2	AM		$\checkmark$	
DiCalvi, Pasquale	Male	Year N2	AM		$\checkmark$	
DiMichele, Sara	Female	Year N2	PM	✓		
Ebi, Danesh	Male	Year N2	PM	~		
Enlai, Cheng	Male	Year N2	PM	✓		
Total				10	10	
•						OK Cancel

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

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

 Current Applications – select this check box to display any applicants who have an application status of Offered (i.e. they have been offered a place at your school). These applicants are displayed with an orange background.

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

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

ffective Date Range From effection		end of the aca	demic vear (		00	Over the whole academic year ( 05/09/2016 - 04/09/2017 )		
tudent Status			,,		0	······		
Students		Accepted /	Applications		V	Current Applications (Applied / Offered / Reserved)		
lembers								
lembers						Print	8 <b>6</b> 2	Actions -
	_						~	Gender
Name	Gender	Year Group	Reg Group	PM	AM		~	Year
Abhra, Abjit	Male	Year N2	АМ		$\checkmark$		~	Reg
Abhra, Alisha	Female	Year N2	PM	✓				House
Abhra, Neel	Male	Year N2	PM	$\checkmark$				Ethnicity
Ackton, Stan	Male	Year N2	AM		✓			Previous Schoo
Beiber, Justin	Male	Year N2	AM		✓			Admission no.
Berkley, Jack	Male	Year N2	PM	✓				Date of Birth
Del Sonno, Nadia	Female	Year N2	АМ		✓		•	View Single
DiCalvi, Pasquale	Male	Year N2	АМ		✓			View Triple
DiMichele, Sara	Female	Year N2	PM	✓				their imple
Ebi, Danesh	Male	Year N2	PM	✓				
Enlai, Cheng	Male	Year N2	PM	✓				*
Total				10	10			
•				_	_	III	_	•
							ок	Cancel

The previous graphic shows that **Date of Birth** has been added to the grid. It can also be useful to change the view to **View Triple**, which displays a breakdown of totals for females and males in each group.

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



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

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

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

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

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

Enter parameter values for report		
Supply Effective date	05/09/2016	
Select Year Group(s)	Select All     Year N2       Clear All     Year 1       Year 2     Year 3	х Ш т
Select Registration Group(s)	Select All PM AM Clear All ELM Show All ASH	×
		OK Cancel

- 3. Deselect the **Bypass effective date** check box.
- 4. Enter the required date, e.g. 05/09/2016 or click the **Calendar** button and select the required date.
- 5. Select the required **Year Group(s)** and **Registration Group(s)** then click the **OK** button to produce the required report.

#### **Registration Groups (Dated) Report**

ender [ [	Date of Birth 01-09-2005 01-09-2005 02-02-2006 14-02-2006 14-12-2005 13-12-2005
[	01-09-2005 02-02-2006 14-02-2006 14-12-2005
	02-02-2006 14-02-2006 14-12-2005
	14-02-2006 14-12-2005
	14-12-2005
	13-12-2005
	10-01-2006
	11-02-2006
	22-12-2005
	28-09-2005
[	07-12-2005
	30-12-2005
[	29-10-2005
[	09-04-2005
	23-06-2006
[	31-10-2005
[	11-02-2006
	12-04-2006
[	25-12-2005
	26-02-2006
[	26-01-2006
[	09-11-2005
	09-11-2005
[	11-01-2006
[	08-07-2006
[	27-11-2005
	27-03-2006
[	25-05-2006
	17-11-2005
	05-10-2005
	1

#### **Registration Group (Dated – DOB Sort)**

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

#### **Registration Group (Dated – Gender Sort)**

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

#### **Registration Group (Dated – With Columns)**

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



# **02** Processes to be Carried Out in Other SIMS Modules

In SIMS Attendance - Entering Reasons for Absence Last Year	59
Academic Management (Primary Curriculum) End of Year	
Processes	60
Dinner Money	61
After the New Academic Year has Started	62
Running Housekeeping Routines in SIMS	68
In SIMS Attendance - Printing OMR Registration Sheets for the	
First Week of Term	70

# **In SIMS Attendance - Entering Reasons for Absence Last** Year

If you are using OMR Absence sheets, read the sheets in via **Routines |** Attendance | OMR Entry | Read OMR Absence Sheets.

If you are using Edit Marks (via **Focus | Attendance | Edit Marks**), put the date back in the **Week Beginning** field to the required date, then click the **Search** button.

	Open 🚍 Print 🔯 Browse 🕂 Next 🏫 Previous	📄 Links 👻 😨 Help 💥 C	los
Week Beginnir	ng 03/03/2016 🔂	Group Type Reg Group 🗸	
Include ac	ccepted applicants		
Treat as o	ne group		
Short Name	Description		
	PM		
	AM		
М	AM ELM		
M LM			
M M LM INE SH	ELM		

Double-click the required class to display marks for the chosen group(s) then edit as required. Selecting the **Show only students with Unexplained Absences today** check box may speed up this process.

Previous Week 🐳 Ne Attendance Din	ext Week her Regist	÷	lect A	11	Sł	now o	nly st	tuden	ts wit	h Une	xplai	ned Absences today
Name	Reg		on /02	01	ue 103		ed (03	T 03	hu /03		ri /03	
Name	Reg	АМ	PM	АМ	РМ	АМ	РМ	АМ	РМ	АМ	PM	
Adams, Nancy	PM	1	N	1	X	L	N	1	N	1	N	
lala, Candis	PM	1	N	1	X	L	X	1	X	1	1	
Carlton, Eleanor	PM	1	N	1	X	1	X	1	X	1	1	
Colins, Ralph	PM	1	X	1	X	1	X	1	X	1	X	
Ewy, Monica	PM	I	I	I	Ι	Ι	I	I	Ι	I	I	
rank, Dominik	PM	1	N	1	N	1	N	1	1	1	N	
àorev, Anastasya	PM	1	X	1	X	1	X	1	X	1	X	
laffri, Padm	PM	1	X	1	X	1	X	1	Χ	1	X	
AcGregor, Harvey	PM	1	X	1	X	1	X	1	N	1	X	
Villiamson, Zachary	PM	1	X	1	X	1	X	1	N	1	1	

#### Completed

# Academic Management (Primary Curriculum) End of Year Processes

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

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

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

### **Dinner Money**

There are no end of year processes in Dinner Money. However, the following activities should be carried out:

- It is advisable to reconcile pupil/student and staff balances, issue refunds or collect debts (where possible) before the end of term, particularly for any pupil/students or staff who are leaving the school.
- Any meal price changes should ideally be entered at the start of the academic year, as additional processing will be necessary to remove recorded meals and add price changes retrospectively. These can be entered via Tools | Dinner Money | Pupil Meal Definitions/Staff Meal Definitions/Adhoc Meal Definitions and/or Other Sales Definitions.
- Print the final catering return on the last day of term.
- Where appropriate, send the debt and credit reports (produced via Reports | Dinner Money | Finance | Pupil Balances or Staff Balances) to the caterers.
- Prior to the start of the new catering year, a new catering year should be created via **Tools | Dinner Money | Setup**, corresponding to the start of the new catering year.

NOTES: The new academic year should be created first. You will then need to close and re-open SIMS before adding the new catering year.

The catering year may not correspond with the academic year.

You may choose to print off a copy of the Pupil Balances and Staff Balances reports (via **Reports | Dinner Money | Finance | Pupil** (or **Staff**) **Balances**) from the date of your opening balances in Dinner Money to the last working day of the current academic year as a record of opening balances, all meals taken, transactions and balances at the year end.

#### **Meal Charges Mapping**

#### Tools | Dinner Money | Setup

Please be aware of the following, in cases where schools have mapped meal charges to classes/registration groups, rather than to either Tiers or Year groups (as the latter two are less likely to change).

It is not possible to change the meal charges mapping from, for example, classes to year groups. If schools change their class names in September, but simply rename the old class names, the existing meal definitions will continue to work with the new names.

If schools create new classes and make old classes inactive, in September an error message will be displayed when trying to enter payments because any meals recorded in the new classes will not be mapped to the existing meal definitions. Also, schools will not be able to add the new classes to the existing meal definitions/charges because the meals will have already been recorded (even if they try to delete the recorded meals).

#### 02| Processes to be Carried Out in Other SIMS Modules

To prevent this issue occurring, you must either:

- Create new meal definitions for the new classes, adding the meal price (with a start date before the start of term) and selecting all the new classes. This will need to be done for all active meal types, including Absent, Other School, etc. The disadvantage of this is that in future schools will need to add price changes to both meal definitions, to cover all classes.
  - or
- Give all current meal charges an end date in the existing meal definitions, e.g. 31/08/2016. Enter a new meal definitions, with meal charges having a start date of, e.g. 01/09/2016 and select all classes listed. You can carry on using the existing meal types, as long as the charge dates do not overlap in the meal definitions. Then append the name of the old meal definitions to include, e.g. 'Inactive'.

This must be done before the start of the new academic year.

If the new year has already started and schools have recorded meals, you can create temporary meal types and definitions for the new classes and use these to re-record the meals for the affected dates. Give all current meal charges an end date in the existing meal definitions, e.g. 31/08/2016. Enter a new meal definitions, with meal charges having a start date of, e.g. 01/09/2016 and select all classes listed. You can carry on using the existing meal types, as long as the charge dates do not overlap in the meal definitions. Then append the name of the old meal definitions to include, e.g. 'Inactive'.

## **After the New Academic Year has Started**

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

- In SIMS, admit applicants (please see *Admitting Applicants* on page 62).
- In SIMS, record any re-admission pupil/students (please see Re-Admitting Pupil/Students on page 65).
- In Attendance, print the official register for July (please see *In SIMS Attendance Printing the Official Register for July* on page 66).
- In Attendance, use the Part-Time Pupil/Students routine to add Not Required codes (please see *In SIMS Attendance Using the Part-Time Pupil/Students Routine to Add Not Required Codes* on page 67).

#### **Admitting Applicants**

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

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

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

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

Name	Admi	ssion Season <any></any>	•	Status	Active	•
Admission Year 2016/2017	✓ Year	Group <any></any>	-			
Name	Admission Year	Admission Season	Year Group		Planned Admission	Status
2016/2017 - Autumn Year N2	2016/2017	Autumn	Year N2		20	Active
2016/2017 - Autumn Year R	2016/2017	Autumn	Year R		40	Active

2. Search for and then double-click the required intake group to display the **Admit Applicant Detail** page.

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

<u>1</u> Summary			
Total Applicants	7	Accepted	5
Planned Admission	3	Withdrawn	1
Applied	0	Rejected	0
Offered	0	Admitted	1

Total Applicants	The number of applicants who have applied for a place in this intake group.
Planned Admission	The original number of new applicants intended for this intake group.
Applied	The number of applicants who have applied for places in this intake group.
Offered	The number of applicants offered places in this intake group.
Accepted	The number of applicants who have accepted places in this intake group.
Withdrawn	The number of applicants who have withdrawn their application.
Rejected	The number of rejected applications in this intake group (Independent schools only).

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

	ccepted		~					Assign Permaner	nt UPN 4	Admit All
Name	Gender	Date Of Birth	Date Of Admission	Enrollment Status	Application Status	UPN	Assign UPN	Admitted	Withdrawal	Enquired
ate, Alexander	Male	19/04/2008	05/09/2016	Single Registration	Accepted		No Change			
'homson, Olivia	Female	26/01/2008	05/09/2016	Single Registration	Accepted		No Change			
Vaters, Ashlie	Female	04/09/2008	05/09/2016	Single Registration	Accepted		No Change			
√illiams, Ruth	Female	05/11/2008	05/09/2016	Single Registration	Accepted		No Change			

- 3. If you wish to admit applicants with a different application status (such as **Offered**) select it from the **Application Status** drop-down list then follow the remainder of this process.
- If you need to add UPNs, click the Assign Permanent UPN button. The Assign UPN column is then populated with Assign Permanent UPN, as shown in the following graphic.

Name	Gender	Date Of Birth	Date Of Admission	Enrollment Status	Application Status	UPN	Assign UPN	Admitted	Withdrawal	Enquired
▶ Ogden, Rachel							Assign Perman 🚿	·		
Tate, Alexander	Male	19/04/2008	05/09/2016	Single Registration	Accepted		Assign Permanent			
Thomson, Olivia	Female	26/01/2008	05/09/2016	Single Registration	Accepted		Assign Permanent			
Waters, Ashlie	Female	04/09/2008	05/09/2016	Single Registration	Accepted		Assign Permanent			
Williams, Ruth	Female	05/11/2008	05/09/2016	Single Registration	Accepted		Assign Permanent			

5. To edit individual applicants, select the required value from the drop-down list in the **Assign UPN** column, e.g. **No Change** (if the applicant already has a UPN) or **Assign Temporary UPN**, as shown in the following graphic.

Name	Gender	Date Of Birth	Date Of Admission	Enrollment Status	Application Status	UPN	Assign UPN	Admitted	Withdrawal	Enquirec
Ogden, Rachel							Assign Permanent			
Tate, Alexander	Male	19/04/2008	05/09/2016	Single Registration	Accepted		Assign Permanent			
Thomson, Olivia	Female	26/01/2008	05/09/2016	Single Registration	Accepted		No Change			
Waters, Ashlie	Female	04/09/2008	05/09/2016	Single Registration	Accepted		Assign Permanent			
I Williams, Ruth	Female	05/11/2008	05/09/2016	Single Registration	Accepted		Assign Tempor ⊻			
							No Change Assign Permanent UF Assign Temporary UF			

- Permanent UPNs are issued to new applicants only when it is believed that they have never previously been allocated a UPN, or to replace a temporary UPN.
- Temporary UPNs are issued to an applicant only when a school does not know their permanent UPN (e.g. the school is awaiting a transfer file or awaiting an applicant's information).

**IMPORTANT NOTE:** UPN information is required for School Census. This is the only opportunity to bulk allocate UPNs. If you do not generate them here, you need to allocate UPNs on an individual basis via the **Pupil** (or **Student**) **Details** page. Any known existing UPNs can be entered in the **Basic Details** panel by clicking the **Application** icon on the toolbar or by selecting **Focus | Admission | Applicant**.



Application icon

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

Name	Gender	Date Of Birth	Date Of Admission	Enrollment Status	Application Status	UPN	Assign UPN	Admitted	Withdrawal	Enquired
🕨 Ogden, Rachel									✓	
Tate, Alexander	Male	19/04/2008	05/09/2016	Single Registration	Accepted		Assign Permanent	1		
Thomson, Olivia	Female	26/01/2008	05/09/2016	Single Registration	Accepted		Assign Permanent	1		
Waters, Ashlie	Female	04/09/2008	05/09/2016	Single Registration	Accepted		Assign Permanent	1		
Williams, Ruth	Female	05/11/2008	05/09/2016	Single Registration	Accepted		Assign Permanent	1		

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



#### **Re-Admitting Pupil/Students**

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

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

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

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

- 1. Select Focus | Pupil (or Student) | Pupil (or Student) Details to display the Pupil (or Student) Details page.
- 2. Click the **New** button to display the **Add Student** page.
- 3. Enter the pupil/student's known details into the **Basic Details** panel then click the **Continue** button. A list of **Matched People** matching the search criteria entered is displayed.
- 4. Highlight the required pupil/student and click the **Open** button to display a warning message **The selected pupil/student is a Leaver, do you want to re-admit the Pupil/student?.**
- 5. If you are certain that this is the pupil/student who should be re-admitted, click the **Yes** button to display the pupil/student's details.
- 6. Add/edit further details as required, then click the **Save** button. All mandatory fields are highlighted in red and must be completed before you are able to finally save the pupil/student's details.
- 7. Click the **Save** button again if any additional data has been added.

### Completed

#### In SIMS Attendance - Printing the Official Register for July

Before printing the official register for July, you should deal with missing marks and add reasons for absence for the month you are going to print.

1. Select **Reports | Attendance | Whole Group Pupil Reports | Official Register Report** to display the **Official Register Report** page.

🕯 Search 📥	Print	🙆 Help 💥 Clo
From 01/09	/2015 🔂 to 20/03/2016 🛃	Group Type Reg Group 👻
Title Officia	Register	Show Totals
		Show Key to Codes
		☑ Show History of Changes ☑ Include changes from `N` mark
Short Name	Description	
PM	PM	
AM	AM	
ELM	ELM	
PINE	PINE	
ASH	ASH	
OAK	OAK	
2JB	2JB	
2GH	2GH	
зто	3TO	
3CB	3CB	
4ES	4ES	
4SL	4SL	
5BB	5BB	
5DT	5DT	
6VC	6VC	
6KH	6KH	

2. Highlight the required group(s), using **Ctrl** or **Shift** to highlight multiple groups. Click the **Print** button to produce the required reports.

# In SIMS Attendance - Using the Part-Time Pupil/Students Routine to Add Not Required Codes

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

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

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

🦘 Part Tim	ne Pupils										
M Search 🤇	😚 Preserve 💾	Apply								🕗 Help	Close
From w/b	5/09/2016	🖌 to w/b	26/12/2016						Group Type	Part Time Group	•
Short Name	Descriptio	10									
AM											
PM	AM only PM only										
Select All	Deselect Al										
	<ul> <li>Attendance</li> </ul>				6	Au	e required al	Labora -			
	Attendance	required in a	afternoons only	/	0	Apply a we	ekly pattern	of Not Requ	ired codes		
Mon AM		Tue AM	1	Wed AM	Wed PM	Thu AM	Thu PM	Fri AM	Fri PM	]	

- 2. Specify the date range appropriate to the period for which your chosen group will be part-time. The dates must lie within the academic year.
- 3. Highlight the required groups (using **Ctrl** or **Shift** to highlight multiple groups). The **Select All** and **Deselect All** button can also be used if required.
- 4. Specify when attendance is required by selecting one of the radio buttons.

Enter 'Not Required' codes									
<ul> <li>Attendance required in mornings only</li> </ul>	Attendance required all day								
C Attendance required in afternoons only	Apply a weekly pattern of Not Required codes								

- Attendance required in mornings only
- Attendance required in afternoons only

Attendance required all day

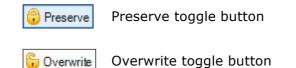
Select this option when a part-time pupil/student starts full-time school. All 'Not Required' codes for the pupil/student are removed from the system.

Apply a weekly pattern of Not Required codes Select this option if a mixture of AM and PM sessions is required. The associated grid is then enabled. Select the check boxes that represent the sessions when the pupil/students are not required to attend school.

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



Existing marks can be protected or overwritten. This is achieved by clicking 5. the **Preserve/Overwrite** toggle button.



selected range of weeks.

Overwrite toggle button

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

Click the **Apply** button to apply the codes to the selected part-time 6. pupil/students.

## **Running Housekeeping Routines in SIMS**

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

#### **Importing the Key Stage Wizard**

If you would like to import the assessment components of your new pupil/students via CTF, you will need to import the relevant Key Stage wizard(s) into SIMS Assessment before importing the CTF.

In SIMS, select Routines | Data In | Assessment | Import to display the 1. **Import** wizard.

 Click the Field Browser button adjacent to the Select the file to import from field. Navigate to C:\Program Files\SIMS\SIMS .net\AMPA. Double-click the folder relevant to your school, then double-click the Assessment Manager folder.

5 Open							
Look in:	) Assessment	Manager 🗸 🗸	G 🤣 📂 🎞 -				
æ	Name		Date modified	Туре	Size		
and the second s	Assessment	t Mapping Tool Primary.xml	22/09/2015 12:01	XML Document	180 KB		
Recent Places	Av Pt Score	Calc Templates AM7.xml	15/01/2014 07:36	XML Document	172 KB		
	EAL TA Asp	ects.xml	21/03/2013 09:34	XML Document	6 KB		
	En KS1 Tem	plates 2016.xml	29/01/2016 16:41	XML Document	350 KB		
Desktop	En KS1 Tem	plates.xml	19/02/2015 14:01	XML Document	519 KB		
	En KS2 Tem	plates 2016.xml	29/01/2016 16:41	XML Document	352 KB		
6 <b>33</b>	En KS2 Tem	plates.xml	19/02/2015 14:01	XML Document	838 KB		
Libraries	EYFS Baseli	ne Assessment Template CEM 20	15/01/2016 13:46	XML Document	20 KB		
	EYFS Baseli	ne Assessment Template EE 2016	15/01/2016 13:46	XML Document	29 KB		
	EYFS Baseli	ne Assessment Template NFER 2	15/01/2016 13:46	XML Document	25 KB		
Computer	EYFS Profile	e Template 2015.xml	11/03/2015 10:29	XML Document	161 KB		
	EYFS Profile	e Template 2016.xml	15/01/2016 14:05	XML Document	161 KB		
	EYFS Profile	Wizard 2015.xml	29/07/2015 09:35	XML Document	969 KB		
Network	EYFS Profile	EYFS Profile Wizard 2016.xml		XML Document	969 KB		
	📄 Key Stage 1	Wizard England 2015.XML	22/12/2014 07:58	XML Document	1,069 KB		
	📄 Key Stage 1	Wizard England 2016.xml	29/01/2016 16:41	XML Document	493 KB		
	Key Stage 2	Wizard England 2015.XML	31/07/2015 10:46	XML Document	1,702 KB		
	Key Stage 2 Wizard England 2016.xml		29/01/2016 16:41	XML Document	493 KB		
	KS1 and 2 Subject Comment Free Text Aspe		29/01/2016 16:39	XML Document	6 KB		
	P Scale Templates Key Stages 1-3 2014.xml		14/01/2014 15:21	XML Document	592 KB		
	Phonics Screening Templates 2015.xml		02/06/2015 10:21	XML Document	105 KB		
	File name:	e: Key Stage 1 Wizard England 2016.xml				n	
	Files of type: Xml files (*xml)				▼ Canc	Cancel	
		Open as read-only					

- 3. Highlight the relevant wizard XML file, e.g. Key Stage 1 Wizard England 2016.XML, then click the **Open** button.
- 4. The name of the selected file is displayed in the **Select the file to import from** field. Any header comments that were added to the file when it was created for export are displayed.
- 5. Select the **Overwrite with default values** check box if you want to update the column headings.
- 6. Click the **Finish** button then the **Yes** button to start the import process. This may take several minutes. An Activity Log is displayed when the import is complete. Click the **Close** button.

#### **SIMS Learning Gateway**

#### This section applies only to SIMS Learning Gateway users

- 1. Create and distribute SIMS Learning Gateway accounts for new staff, pupil/students and parents.
- Remove access to SIMS Learning Gateway from leavers, the parents of leavers (where they have no other children at the school), and staff who have left.

For full instructions, please refer to the *Removing Provisioned Users* chapter in the *Active Directory Provisioning Service for Administrators* handbook.

02| Processes to be Carried Out in Other SIMS Modules

# **In SIMS Attendance - Printing OMR Registration Sheets** for the First Week of Term

1. Select Routines | Attendance | OMR Entry | Print OMR Registration Sheet to display the Print OMR Registration Sheet page.

🕈 Search 📥	Print		🕘 Links 🔻 😢 Help 💥 Clos		
From w/b 05	/09/2016 to w/b 17/07/2017	Group Type	Reg Group	•	
Include acc	epted applicants				
Short Name	Description				
PM	PM				
PM AM	PM AM			:	
AM	AM			l	
AM Elm Pine	AM ELM				
AM ELM	AM ELM PINE			l	

2. Highlight the required group(s) using **Ctrl** or **Shift** to highlight multiple groups. Click the **Print** button to produce the required registration sheets.

Completed



# Contact the Service Desk today on 0345 222 1551 • option 2

# or email us on misservicedesk@ schoolbusinessservices.co.uk