



## Preparation Guide

Applicable to 7.170 onwards

# Preparing for the School Census Autumn 2016 Return (English Secondary Phase Schools)

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## School Census Autumn 2016 Preparation Check List

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

Complete	Description
<input type="checkbox"/>	Check with your System Administrator/Manager that you have the appropriate permissions to run the School Census and record associated data (please see <i>Setting Permissions</i> on page 3).
<input type="checkbox"/>	Upgrade to the SIMS 2016 Summer Release (SIMS 7.170) or later as soon as possible to enable dry runs to be carried out (please see <i>What Version of SIMS is Required?</i> on page 4).
<input type="checkbox"/>	Check with your System Administrator/Manager that the latest fileset version has been imported (please see <i>Importing Revised Filesets for Validation and Reports</i> on page 4).
<input type="checkbox"/>	Carry out a dry run to determine what information needs to be updated (please see <i>Why Carry out a Dry Run?</i> on page 9).
<input type="checkbox"/>	Check School Level information (please see <i>Preparing School Level Information</i> on page 17).
<input type="checkbox"/>	Check that leavers and re-admissions have been recorded (please see <i>Recording Leavers and Re-Admissions</i> on page 26).
<input type="checkbox"/>	Delete any student records that have been created in error (please see <i>Deleting Unwanted Student Records</i> on page 29).
<input type="checkbox"/>	Check the students' basic details (please see <i>Checking Student Details</i> on page 21).
Check the students' various registration details:	
<input type="checkbox"/>	Check the enrolment status, admission date and boarder status (please see <i>Checking Enrolment Status, Admission Date and Boarder Status</i> on page 32).
<input type="checkbox"/>	Check and correct UPNs (please see <i>Checking Unique Pupil Numbers</i> on page 33).
<input type="checkbox"/>	Check and correct unique learner numbers (please see <i>Checking Unique Learner Numbers</i> on page 34).
<input type="checkbox"/>	Check and correct part-time student information (please see <i>Checking Student's Part-Time Details</i> on page 35).
<input type="checkbox"/>	Check and correct the national curriculum year group (please see <i>Checking National Curriculum Year Groups</i> on page 39).
<input type="checkbox"/>	Check and correct each student home address (please see <i>Checking Home Address Information</i> on page 45).
<input type="checkbox"/>	Check free school meal eligibility information (please see <i>Checking Free School Meals Eligibility</i> on page 46).

Complete	Description
<input type="checkbox"/>	Check ethnic and cultural information (please see <i>Checking Ethnic and Cultural Information</i> on page 48).
<input type="checkbox"/>	Check the Youth Support Services Agreement (YSSA) status (please see <i>Checking Additional Information</i> on page 49).
<input type="checkbox"/>	Check and correct special educational needs information (please see <i>Checking Special Educational Needs Information</i> on page 37).
<input type="checkbox"/>	Check exclusions information (please see <i>Preparing Exclusions Information</i> on page 50).
<input type="checkbox"/>	Check attendance data (please see <i>Preparing Attendance Information</i> on page 60).
<input type="checkbox"/>	<p>If applicable to your school, check the Early Years data (<b>applicable to schools that have 2, 3 or 4 year olds students only</b>).</p> <p>For more information, please refer to the Primary version of this guide, which is available on the My Account website (<a href="https://myaccount.capita-cs.co.uk">https://myaccount.capita-cs.co.uk</a>) by using the search facility to find CENSUS15 documentation.</p>
<input type="checkbox"/>	<p>Check Post 16 information recorded in Course Manager (please see <i>Preparing Post 16 Information in Course Manager</i> on page 61) (<b>applicable to Secondary schools with a Sixth Form only</b>).</p> <p>Refer to the <i>Preparing Post 16 Data for the School Census Autumn 2016</i> guide, which is available on the My Account website (<a href="https://myaccount.capita-cs.co.uk">https://myaccount.capita-cs.co.uk</a>) by using the search facility to find CENSUS16 documentation.</p>

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# 01 | Getting Started

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## Introduction

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

The information in this guide applies to all LA maintained Secondary schools, Middle deemed Secondary schools, All-Through schools (secondary phase) and Pupil Referral Units (secondary phase). It also applies to Academies that cover the Secondary school phase and City Technology Colleges (CTCs) also, Service Children's Education (Secondary schools) and on a voluntary basis.

For schools with a sixth form, an additional Preparation guide is available, which deals specifically with Post 16 data: *Preparing Post 16 Data for the School Census Autumn 2016 Return* guide.

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

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

## How has the School Census Autumn Return Changed since Last Year?

Changes to the School Census Autumn Return include the following:

### Adopted from Care Renamed

**Tools | Statutory Return Tools | Update Post Looked After Arrangements Routines | Statutory Return | School Census**

Adopted from Care is now known as Post Looked After Arrangements; the user interface has been updated accordingly. Related column headers (e.g. in reports) are displayed as **PLAA**.



#### **More Information:**

*Updating Students Post Looked After Arrangements on page 58*

## Unique Property Reference Number (UPRN) for Student Addresses

### Focus | Student | Student Details

The Unique Property Reference Number (UPRN) for both on-roll students and leavers is collected for the School Census Autumn 2016 Return. The **UPRN** is displayed in the **Addresses** panel on the **Student Details** page once the address has been validated.



#### More Information:

*Checking Home Address Information on page 45*

## New Ethnic/Cultural Data Items

### Focus | Student | Student Details

The following new data items (located in the **Ethnic/Cultural** panel) are collected for the first time in the School Census Autumn 2016 Return:

- **Country of Birth** - a student's country of birth can be selected from a drop-down list in the **Ethnic/Cultural** panel.
- **Nationality** - a student's nationality (or nationalities) can be specified via **Nationality and Passport Details**.
- **Proficiency in English** - the **Date of Assessment** and **Result (Level)** (e.g. **A - New to English**) should be specified.



#### More Information:

*Checking Ethnic and Cultural Information on page 48*

## In Care for Exclusions

In Care is no longer collected for students who have been excluded from school.

## Traineeships for Post 16 Learning Aims

### Tools | Academic Management | Course Manager | Maintain Course Routines | Statutory Return | School Census

**Traineeship** (a course with work experience) is collected for the first time in the School Census Autumn 2016 Return.

Whether a student is undertaking a traineeship as part of a course can now be indicated in the **Membership and Results** panel in Course Manager.



#### Additional Resources:

Preparing Post 16 Data for the School Census Autumn 2016 Return guide  
*Managing Courses* handbook

## Withdrawal Reason

### Tools | Academic Management | Course Manager | Maintain Course Routines | Statutory Return | School Census

The reason for withdrawing from a Learning Aim is collected for any Learning Aim with the status of **Withdrawn** within the collection period (01/08/2015 to 06/10/2016). Previously, it was collected for the current academic year only.

The Learning Aim **Status** can be selected in the **Membership and Results** panel on the **Course Details** page.

## Additions to the Bulk Update Routine

### Routines | Student | Bulk Update

Three new data items (**Country of Birth**, **Proficiency in English** and **Nationality**) are now available for selection via the Bulk Update routine.



#### Additional Resources:

*Preparing for the School Census Autumn 2016 Return guides*



#### More Information:

*Updating Information Using the Bulk Update Routine on page 22*

## Setting Permissions

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

### Producing the Return

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

### Editing and Preparing Data

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

- Administration Assistant
- Admissions Officer
- School Administrator.

### Importing Revised Files

The Import Fileset functionality enables updates to the Validation Errors Summary and the Summary report (derived from files supplied by the Statutory Body), and detail reports (provided by SIMS), to be imported into SIMS between SIMS releases. To use the Import Fileset functionality (via **Tools | Setups | Import Fileset**), you must be a member of any of the following user groups in System Manager:

- Returns Manager
- System Manager.

For more information about the Import Fileset functionality, please refer to the applicable preparation guide, available on the My Account website (<https://myaccount.capita-cs.co.uk>).

### Where to find More Information about Permissions

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

An Excel spreadsheet describing the numerous permissions available in SIMS is available on the My Account website (<https://myaccount.capita-cs.co.uk>).

To find the spreadsheet, search for <sim version> sims permissions spreadsheet, e.g. 7.170 sims permissions spreadsheet.



## What Version of SIMS is Required?

To run the return, you must have the SIMS 2016 Summer Release (7.170) or later installed.

To check which version of SIMS is installed, open SIMS and then select **Help | About SIMS**. A dialog similar to the one shown in the following graphic is displayed. The version should read 7.170 or later.



## Importing Revised Filesets for Validation and Reports

**Applicable to the Personnel Officer, Returns Manager and System Manager**

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

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

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

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

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

## Before Importing the Revised Files

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

If the connection is unsuccessful, check the following details:

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

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



### Additional Resources:

*Setting up and Administering SIMS handbook*

## Importing the Revised Files

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

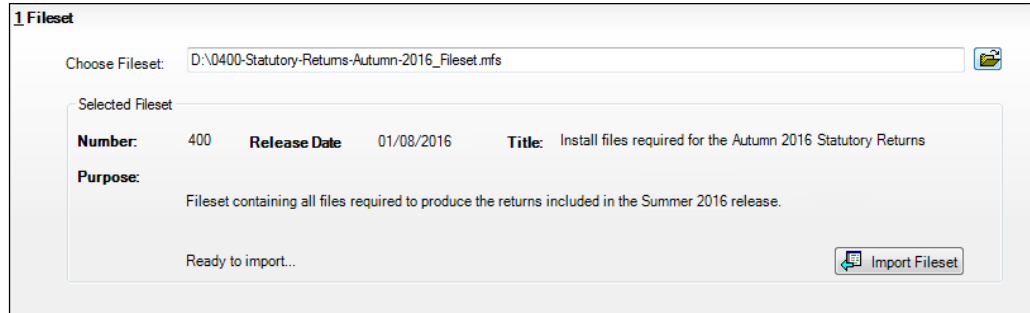
4. Click the **Browse** button to display the **Open** dialog.
5. Navigate to the location of the downloaded fileset. The file name is made up of the following data fields: <Fileset Number>-StatutoryReturns-<Term and Year>\_Fileset.mfs.

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

01 | Getting Started

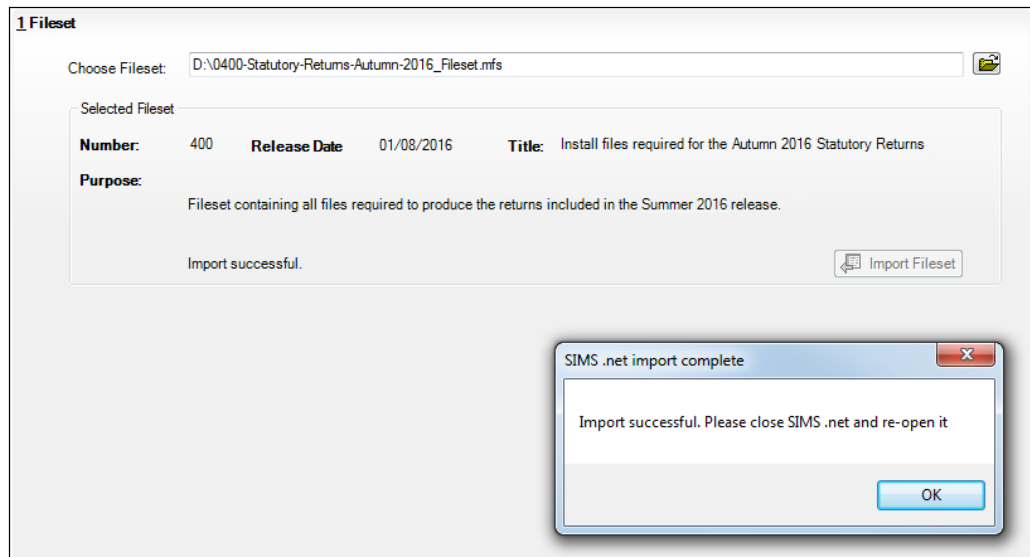
- Highlight the file then click the **Open** button. Alternatively, double-click the required MFS file to return to the **Import Fileset** page.

*NOTE: The following graphics show example data only.*



Details of the selected fileset are displayed, including the version **Number** of the fileset, the **Release Date** and the fileset description (**Title**).

- Click the **Import Fileset** button to import the fileset into the DMS. When the import process is finished, **Import successful** is displayed at the bottom left-hand side of the **Fileset** panel and you are advised to restart SIMS. This ensures that the newly imported data will take effect.



- Click the **OK** button then restart SIMS.
- Run the return in the usual way.

 **Completed**

## School Census Return Process Flow

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

1. Upgrade to the SIMS 2016 Summer Release (7.170) or later.
2. Carry out one or more dry runs to identify any errors that may exist in your data.
3. Ensure that the relevant student and school data exists in SIMS and that it is complete and correct. Use the Bulk Update routine (**Routines | Student | Bulk Update**) to correct missing or invalid data, if required.
4. Complete the information on the **Census Return Details** page.
5. Create and validate the return.
6. Resolve any validation errors/queries and then create and validate the return again.

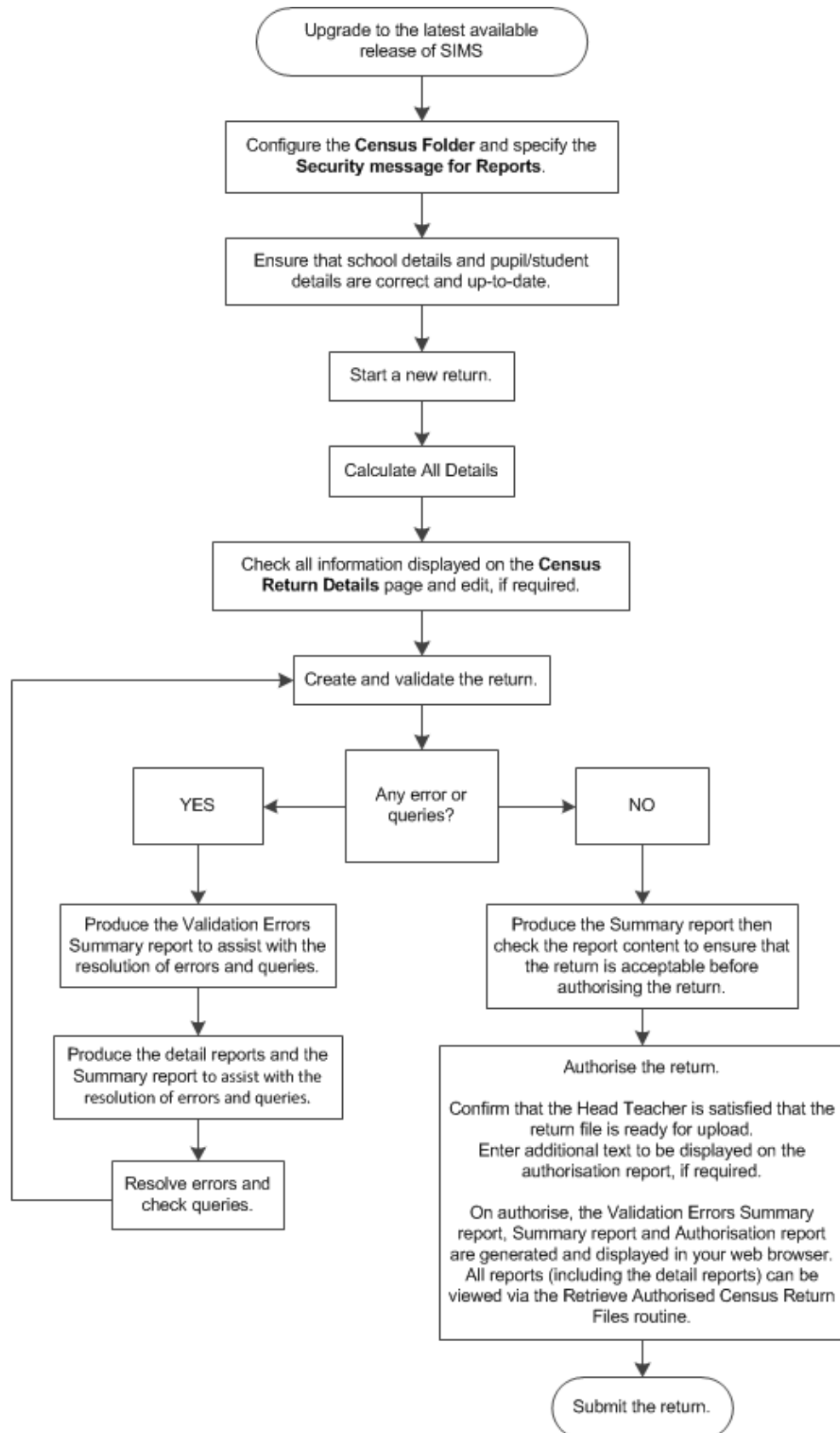
Continue to resolve the validation failures then repeat the Create and Validate routine until you are satisfied that the content of the return is correct.

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

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

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

8. Once approval has been given, authorise the return (**Routines | Statutory Returns | School Census – Authorise** button).
9. Upload the return to the DfE COLLECT data collection website or submit it to your Local Authority, as applicable.



# 02 | Carrying out a Dry Run

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## Why Carry out a Dry Run?

When you have upgraded to the SIMS 2016 Summer Release (7.170), you can carry out one or more dry runs of the return.

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

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

## The Dry Run Process

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

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

**IMPORTANT NOTE:** Due to the sensitive nature of some of the data stored in SIMS, careful consideration should be given when specifying the location of any folder into which you save sensitive data, e.g. census returns, imported and exported CTFs, etc. You should be mindful of your school's responsibilities with respect to information security.

Consider which users have access to the chosen folder, especially if the folder is shared on a server. The DfE recommends ISO27001 as the standard for information security (<http://www.itgovernance.co.uk/iso27001.aspx>). If you are in any doubt, you should consult with your IT Security Officer before proceeding.

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

- By default, the return **Description** is displayed as **School Census Autumn 2016**. Edit the **Description** to any name that will clearly distinguish this dry run from the actual return, which will be generated later, e.g. Autumn16Test.
- In the **Census Details** panel, click the **Calculate All Details** button to extract the required information from the SIMS database and display the results in the various panels of the **Census Return Details** page.
- If there is any missing or invalid data, an error message is displayed on the Status Bar. This data must be added or corrected before the return can be created and validated.
- Click the **Create & Validate** button to start the validation process. This may take some time. Any missing or invalid data is listed in the **Validation Errors Summary** panel, located at the bottom of the page.



**Additional Resources:**

Detailed information about completing the individual panels on the **Census Return Details** page is available in the *Producing the School Census Autumn 2016 Return (English Secondary/Middle deemed Secondary Schools)*.

**Resolving Validation Errors and Checking Queries**

After creating the return and validating the data, any errors and queries found are listed in the **Validation Errors Summary** panel at the bottom of the **Census Return Details** page.

Type	Sequence	Message	Location	Solution
F	1500	UPN missing	Name: Abraham, Janel Date of Birth: 2005-05-19, Female/UPN:	# Go to Focus   Student   Student Details and add or issue a UPN.
F	1500	UPN missing	Name: Reid, Rosiel Date of Birth: 2009-03-07, Female/UPN:	# Go to Focus   Student   Student Details and add or issue a UPN.
F	1840	Pupils aged 5 and over Language missing or invalid.	Name: Henderson, Jacki Date of Birth: 2010-05-07, Male/UPN: K823299914029	# Go to Focus   Student   Student Details Ethnic-cultural panel and enter First language.
F	2350	Insufficient address information provided	Name: Bains, Kirki Date of Birth: 2005-01-18, Male/UPN: H820200109012	# Go to Focus/Student/Student Details Addresses and edit pupil's address
Q	1601Q	Please Check: Pupil's age is out of range for school type.	Name: Sungal, Skaistel Date of Birth: 2003-03-28, Female, Age: 12/UPN: B820200106088	# Go to Focus   Student   Student Details and enter pupil's date of birth.
Q	1620Q	Please check: duplicate pupil records with the same Surname, Forename, Gender and Date of birth.	Name: Bennison, Hugo Date of Birth: 2010-02-03, Male/UPN:	# Go to Focus/Student/Student details and check for duplicate pupil record
Q	1620Q	Please check: duplicate pupil records with the same Surname, Forename, Gender and Date of birth.	Name: Bennison, Hugo Date of Birth: 2010-02-03, Male/UPN: V823299914008	# Go to Focus/Student/Student details and check for duplicate pupil record
Q	2355Q	Please check: Pupil record with no address details	Name: Balinaki, C/hi Date of Birth: 2010-03-14, Female/UPN: C823299914005	# Go to Focus/Student/Student Details Addresses and edit pupil's address
Q	2520Q	Please check: sessions possible should not be greater than 150	Name: Aaron, Lizi Date of Birth: 2005-09-01, Female/UPN: J820200109032	# Go to Focus   Attendance (Lesson Monitor)   Display Marks and check the attendance marks
Q	2520Q	Please check: sessions possible should not be greater than 150	Name: Aaron, Sophie Date of Birth: 2005-09-01, Female/UPN: M820200109034	# Go to Focus   Attendance (Lesson Monitor)   Display Marks and check the attendance marks

The number of errors and queries found during the Create and Validate process is displayed in the header of the **Validation Errors Summary** panel. Details about each of the errors and queries found are displayed in the columns as described in the following table.

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

To assist in the resolution of any errors and queries:

- When the mouse pointer is hovered over a **Message**, **Location** or **Solution** cell, hover help displays the entire content of that cell.
- When the mouse pointer is hovered over an error or query row, it changes to a hand if a hyperlink is available to the area of SIMS where the issue can be checked.

Type	Sequence	Message	Location	Solution
F	1500	UPN missing	Name: Abraham, Janel Date of Birth: 2005-05-13, Female/UPN:	# Go to Focus   Student   Student Details and add or issue a UPN
F	1500	UPN missing	Name: Reid, Rosal Date of Birth: 2009-03-07, Female/UPN:	# Go to Focus   Student   Student Details and add or issue a UPN
F	1540	Pupils aged 5 and over Language missing or invalid.	Name: Henderson, Jacki Date of Birth: 2010-05-07, Male/UPN: K52329914029	# Go to Focus   Student   Student Details Ethnic/cultural panel and enter First language.
F	2350	Insufficient Address information provided	Name: Bains, Kirki Date of Birth: 2005-01-18, Male/UPN: H820200109612	# Go to Focus   Student   Student Details Ethnic/cultural panel and enter First language.
Q	1601Q	Please Check: Pupil's age is out of range for school type.	Name: Sungai, Skasiel Date of Birth: 2003-03-28, Female, Age: 12/UPN: B820200106088	# Go to Focus   Student   Student Details and enter pupil's date of birth.

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

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



## 02| Carrying out a Dry Run

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

Type	Sequence	Message	Location	Solution
F	1500	UPN missing	Name: Abraham, Janel Date of Birth: 2005-05-19, Female UPN:	F Go to Focus   Student   Student Details and add or issue a UPN
F	1500	UPN missing	Name: Reid, Rosal Date of Birth: 2009-03-07, Female UPN:	F Go to Focus   Student   Student Details and add or issue a UPN
F	1840	Pupils aged 5 and over Language missing or invalid.	Name: Henderson, Jacki Date of Birth: 2010-05-07, Male UPN: K823299914029	F Go to Focus   Student   Student Details Ethnicultural panel and enter First language.
F	2380	Insufficient Address information provided.	Name: Barns, Kirki Date of Birth: 2005-01-18, Male UPN: H820200109012	F Go to Focus Student Student Details Addresses and edit pupil's address
Q	1601Q	Please Check: Pupil's age is out of range for school type	Name: Sungail, Skastei Date of Birth: 2003-03-28, Female, Age: 12 UPN: B820200106088	F Go to Focus   Student   Student Details and enter pupil's date of birth.
Q	1602Q	Please check: duplicate pupil records with the same Surname, Forename, Gender and Date of birth.	Name: Bernison, Hugo Date of Birth: 2010-02-03, Male UPN:	F Go to Focus Student Student details and check for duplicate pupil record

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

Type	Sequence	Message	Location	Solution
F	1500	UPN missing	Name: Abraham, Janel Date of Birth: 2005-05-19, Female UPN:	F Go to Focus   Student   Student Details and add or issue a UPN
Q	2502Q	Please check: sessions possible should not be greater than 150	Name: Abraham, Janel Date of Birth: 2005-05-19, Female UPN:	F Go to Focus   Attendance (Lesson Monitor)   Display Marks and check the attendance marks

- Use the **Errors Search** to display the required error or query you want to view. Select **ALL**, **ERRORS**, **QUERIES** or the required number from the drop-down list. The total number of rows that relate to the selected validation is displayed adjacent to the **Error Search** field.

Type	Sequence	Message	Location	Solution
Q	1601Q	UPN missing	Name: Abraham, Janel Date of Birth: 2005-05-19, Female UPN:	F Go to Focus   Student   Student Details and add or issue a UPN
Q	1602Q	UPN missing	Name: Reid, Rosal Date of Birth: 2009-03-07, Female UPN:	F Go to Focus   Student   Student Details and add or issue a UPN
Q	1840	Pupils aged 5 and over Language missing or invalid.	Name: Henderson, Jacki Date of Birth: 2010-05-07, Male UPN: K823299914029	F Go to Focus   Student   Student Details Ethnicultural panel and enter First language.
Q	2380	Insufficient Address information provided.	Name: Barns, Kirki Date of Birth: 2005-01-18, Male UPN: H820200109012	F Go to Focus Student Student Details Addresses and edit pupil's address
Q	1601Q	Please Check: Pupil's age is out of range for school type	Name: Sungail, Skastei Date of Birth: 2003-03-28, Female, Age: 12 UPN: B820200106088	F Go to Focus   Student   Student Details and enter pupil's date of birth.
Q	1602Q	Please check: duplicate pupil records with the same Surname, Forename, Gender and Date of birth.	Name: Bernison, Hugo Date of Birth: 2010-02-03, Male UPN:	F Go to Focus Student Student details and check for duplicate pupil record

- By default, when **ALL** is selected from the **Errors Search** drop-down list, the errors are displayed at the top of the list.

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

Type	Sequence	Message	Location	Solution
F	1500	UPN missing	Name: Abraham, Janel Date of Birth: 2005-05-19, Female UPN:	F Go to Focus   Student   Student Details and add or issue a UPN
F	1500	UPN missing	Name: Reid, Rosal Date of Birth: 2009-03-07, Female UPN:	F Go to Focus   Student   Student Details and add or issue a UPN
F	1840	Pupils aged 5 and over Language missing or invalid.	Name: Henderson, Jacki Date of Birth: 2010-05-07, Male UPN: K823299914029	F Go to Focus   Student   Student Details Ethnicultural panel and enter First language.
F	2380	Insufficient Address information provided.	Name: Barns, Kirki Date of Birth: 2005-01-18, Male UPN: H820200109012	F Go to Focus Student Student Details Addresses and edit pupil's address
Q	1601Q	Please Check: Pupil's age is out of range for school type	Name: Sungail, Skastei Date of Birth: 2003-03-28, Female, Age: 12 UPN: B820200106088	F Go to Focus   Student   Student Details and enter pupil's date of birth.
Q	1602Q	Please check: duplicate pupil records with the same Surname, Forename, Gender and Date of birth.	Name: Bernison, Hugo Date of Birth: 2010-02-03, Male UPN:	F Go to Focus Student Student details and check for duplicate pupil record

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

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

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

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

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

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

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

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

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

## Producing Detail Reports

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

The following reports are currently available:

- On Roll Basic Details Report
- Leavers Basic Details Report
- Exclusions Report
- Attendance Report (1st half term)
- Attendance Report (2nd half term)
- Absentees Report
- SEN Report
- Address Detail Report

## 02| Carrying out a Dry Run

- Free School Meal Eligibility Report
- On Roll Learning Aims Report
- Leavers Learning Aims Report
- Learning Aims by Status Report
- Programmes of Study report
- Prior Attainment report
- Top-up Funding Report
- Post Looked After Arrangements Report.

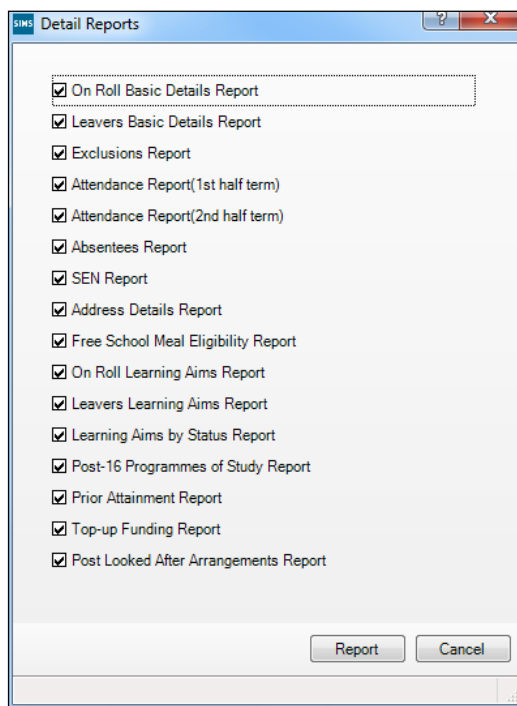
To select a single detail report:

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

The screenshot displays the 'Census Return Details - Autumn 2016 Term: School Census Autumn 2016' interface. At the top, there is a navigation bar with buttons for Save, Undo, Create & Validate, Summary, Authorise, and Detail Report. Below this, there are four tabs: 1 Census Details, 2 School Information, 3 Top-up Funding, and 4 Post Looked After Arrangements. The 'Census Details' section includes fields for Census Date (06/10/2016), Description (School Census Autumn 2016), Attendance collected from (28/03/2016), Exclusions collected from (01/01/2016), FSM collected from (20/05/2016), and Learning Aims collected from (01/08/2015). The 'School Information' section includes fields for School Name (Green Abbey School), LA (823), Telephone (851234), School E-mail Address (office@ga.org.uk), School Phase (SS Secondary), and School Type (Comprehensive all through 11-18). A 'Calculate All Details' button is visible on the right. The 'Detail Report' dropdown menu is open, listing various reports such as On Roll Basic Details Report, Leavers Basic Details Report, Exclusions Report, Attendance Report(1st half term), Attendance Report(2nd half term), Absentees Report, SEN Report, Address Details Report, Free School Meal Eligibility Report, On Roll Learning Aims Report, Leavers Learning Aims Report, Learning Aims by Status Report, Post-16 Programmes of Study Report, Prior Attainment Report, Top-up Funding Report, and Post Looked After Arrangements Report. The 'Multiple Reports...' option is highlighted in blue.

To select multiple detail reports:

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



2. If any reports are not required, deselect the associated check boxes.
3. Click the **Report** button to generate the selected reports, which are displayed in your web browser.

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

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

**Completed**

# 03 | Preparing School Level Information

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## Checking Establishment Details

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

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

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

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

1 Establishment	
School Name	Green Abbey School
LA	823 Central Bedfordshire
Establishment Number	4321
Unique Reference Number	
UK Provider Reference Number	
School Phase	Secondary
School Type	Comprehensive allthrough 11-18
School Governance	Community
Intake Type	Comprehensive
Previous School Name	
Previous Estab Number	
Previous URN Number	
Boarding Pupils	<input type="checkbox"/> Nursery Class <input type="checkbox"/>
Head Teacher	Mr Adrian Blacker
Curriculum Years	7 13
Pupil Genders	Coeducational
Gender on entry to school	Coeducational
Gender on entry to 6th form	Coeducational
NC Year Start Date (dd/mm)	1 / 9
School Specialism	<input type="checkbox"/> Arts <input checked="" type="checkbox"/> Business and Enterprise <input type="checkbox"/> Engineering <input checked="" type="checkbox"/> Humanities
Extended Services	<input type="checkbox"/> Before school childcare and/or activities for school-age children (term-time) <input type="checkbox"/> After school childcare and/or activities for school-age children (term-time) <input type="checkbox"/> Childcare and/or activities, for school-age children during school holidays <input type="checkbox"/> Childcare integrated with a nursery education place for three and four year old...
No. of Childcare Places	0

### 03| Preparing School Level Information

1. Select **Focus | School | School Details** to display the **School Details** page.
2. Check that the details displayed in the **Establishment** panel are correct.
3. Ensure that the **School Type**, **School Governance** and **Intake Type** are displayed correctly. Select the correct value from the drop-down lists, if required.

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

#### Information for Academies:

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

- The **School Type** and **School Governance**.  
Select **Academies** from the applicable drop-down lists.
- The school's **Previous Name** and **Date Name Changed**.
- The **Previous Estab Number** and **Date Number Changed** (both used by the School Census).

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



- The **Previous URN Number** (used by other census returns) and **Date Number Changed**.
4. If you have edited the **Establishment** panel, click the **Save** button.

Completed

## Checking School Telephone and Email Information

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

- School **Email** Address
  - School **Telephone** Number.
1. Select **Focus | School | School Details** to display the **School Details** page.
  2. Click the **Contact Details** hyperlink to display the **Contact Details** panel.

3 Contact Details			
Telephone	<input type="text" value="00234 851234"/>	Fax	<input type="text" value="786542"/>
Email	<input type="text" value="office@ga.org.uk"/> 	Website	<input type="text" value="http://www.theschool.co.uk"/> 

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

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

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

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

**Completed**

# 04 | Preparing Student Level Information

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## Checking Student Details

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

- new students have been added.
- any leavers have been recorded as such.

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

- any duplicate or unwanted student records have been deleted.
- part-time details have been checked/updated.
- student details have been updated where required.

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



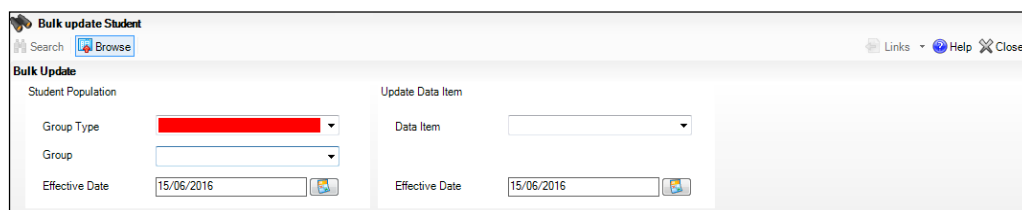
When you have upgraded to the SIMS 2016 Summer Release (7.170), you are strongly advised to carry out one or more dry runs in order to identify any validation errors and queries that must be resolved before the return is submitted (please see *Why Carry out a Dry Run?* on page 9).

## Updating Information Using the Bulk Update Routine

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

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

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

The screenshot shows the 'Bulk update Student' browser window. At the top, there is a search bar with 'Search' and 'Browse' buttons. Below this, the 'Bulk Update' section is divided into two columns. The left column, titled 'Student Population', contains three fields: 'Group Type' (a red dropdown menu), 'Group' (a dropdown menu), and 'Effective Date' (a date field set to 15/06/2016). The right column, titled 'Update Data Item', contains two fields: 'Data Item' (a dropdown menu) and 'Effective Date' (a date field set to 15/06/2016). In the top right corner, there are 'Links', 'Help', and 'Close' buttons.

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

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

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

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

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

Group Type	Group	Data Item	Comment
First Language	<NONE>	First Language	Identifies students who do not have a First Language recorded. Can also be used to change existing values as required.
SEN Status	Statemented	SEN Provision Type	Lists students with a SEN Status of <b>S</b> enabling the SEN Provision to be selected.
Year Group	Year 8 (and above)	Boarder Status	Searches for all students in Year Group 8 and then displays the boarder status recorded against each student's name.

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

Update Data Item

Data Item

Effective Date

- Birth Certificate Seen
- Boarder Status
- Country of Birth
- Disabilities
- Emergency Consent
- English Additional Language
- Ethnic Data Source
- Ethnicity
- First Language**
- First Language Source
- Gifted/Talented subject
- Home Language
- Home Religion
- Mode of Travel
- National Identity
- Parental Consent
- Proficiency in English
- Pupil Nationality
- Pupil Premium Indicator
- SEN Provision Type
- SEN Status
- Service Children in Education
- Source of Service Children
- Speaks Welsh

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

Bulk update Student

Search Browse Links Help Close

**Bulk Update**

Student Population

Group Type: Year Group

Group: <ANY>

Effective Date: 15/06/2016

Update Data Item

Data Item: First Language

Effective Date: 15/06/2016

## 04 | Preparing Student Level Information

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

Bulk Update First Language (as from 15/06/2016) - Year Group: <ANY> (as at 15/06/2016)

Save Undo Print Help Unpin

1 Members

Name	Year Group	Assigned	Acholi	Adangme	Afar-Saho	Afrikaans	Akan/Twi-Fante	Albanian/Shqip	Alur	Ambo/Dshiwambo	Amharic
Abbas, Graham	7	English									
Abbey, Grenetta	10	English									
Abbey, Jimmy	12	English									
Abbey, Sean	7	English									
Abbot, Andrew	9	English									
Abbot, Ben	10	English									
Abbot, Claire	13	English									
Abbot, Hannah	11	English									
Abbot, Susan	12	English									
Able, Cameron	9	English									
Abrahams, Jacqui	10	English									
Ackrington, Robert	9	English									
Ackton, Bill	10	English									
Ackton, Stan	8	English									
Acton, Samantha	7	English									
Adams, Melanie	11	English									
Adedeji, Payal	9	English									
Adkins, Richard	11	English									
Adrianson, Robert	8	English									
Affley, Brian	8	English									
Affleck, Alexis	8	English									
Agathocleous, Joe	9	English									
Ahmad, Carina	9	Kashmiri									
Ahmed, Ackmar	10	Arabic									
Ainsworth, Alison	11	English									
Ainsworth, Zoe	12	English									
Akmal, Mohammed	10	Arabic									
Albion, Frederick	9	English									
Alcott, Alwyn	8	English									
Aldridge, Courtney	9	English									
Alfrey, Trista	8	English									
Allen, Megan	13	English									
<b>Total</b>	1016		1016	0	0	0	0	0	4	0	0

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

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

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

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

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

1 Members												
Name	Year Group	Assigned	Dzongkha/Bhutanese	Ebira	Edo/Bini	Efik-Ibibio	English	Esan/Ishan	Estonian	Ewe	Ewondo	
Abbess, Graham	7	English					✓					
Abbey, Grenetta	10	English					✓					
Abbey, Jimmy	12	English					✓					
Abbey, Sean	7	English					✓					
Abbot, Andrew	9	English					✓					
Abbot, Ben	10	English					✓					
Abbot, Claire	13	English					✓					
Abbot, Hannah	11	English					✓					
Abbot, Susan	12	English					✓					
Able, Cameron	9	English					✓					
Abrahams, Jacqui	10	English					✓					
Ackrington, Robert	9	English					✓					
Ackton, Bill	10	English					✓					
Ackton, Stan	8	English					✓					
Acton, Samantha	7	English					✓					
Adams, Melanie	11	English					✓					
Adedede, Payal	9	English					✓					
Adkins, Richard	11	English					✓					
Adrianson, Robert	8	English					✓					
Affelay, Brian	8	English					✓					
Affleck, Alexis	8	English					✓					
Agathocleous, Joe	9	English					✓					
Ahmad, Carina	9	Kashmiri										
Ahmed, Ackmar	10	Arabic										
Ainsworth, Alison	11	English					✓					
Ainsworth, Zoe	12	English					✓					
Akmal, Mohammed	10	Arabic										
Albion, Frederick	9	English					✓					
Alcott, Alwyn	8	English					✓					
Aldridge, Courtney	9	English					✓					
Allfrey, Trista	8	English					✓					
Allen, Megan	13	English					✓					
<b>Total</b>	1016		1016	0	0	0	908	0	0	0	2	

All the cells within that column are populated with ticks.

2. Edit the exceptions by clicking in the cell associated with the individual student and their status, e.g. the first language of Cameron Able is Estonian.

1 Members												
Name	Year Group	Assigned	Dzongkha/Bhutanese	Ebira	Edo/Bini	Efik-Ibibio	English	Esan/Ishan	Estonian	Ewe	Ewondo	
Abbess, Graham	7	English					✓					
Abbey, Grenetta	10	English					✓					
Abbey, Jimmy	12	English					✓					
Abbey, Sean	7	English					✓					
Abbot, Andrew	9	English					✓					
Abbot, Ben	10	English					✓					
Abbot, Claire	13	English					✓					
Abbot, Hannah	11	English					✓					
Abbot, Susan	12	English					✓					
Able, Cameron	9	Estonian							✓			
Abrahams, Jacqui	10	English					✓					
Ackrington, Robert	9	English					✓					
Ackton, Bill	10	English					✓					
Ackton, Stan	8	English					✓					
Acton, Samantha	7	English					✓					
Adams, Melanie	11	English					✓					
Adedede, Payal	9	English					✓					
Adkins, Richard	11	English					✓					
Adrianson, Robert	8	English					✓					
Affelay, Brian	8	English					✓					
Affleck, Alexis	8	English					✓					
Agathocleous, Joe	9	English					✓					
Ahmad, Carina	9	English					✓					
Ahmed, Ackmar	10	English					✓					
Ainsworth, Alison	11	English					✓					
Ainsworth, Zoe	12	English					✓					
Akmal, Mohammed	10	English					✓					
Albion, Frederick	9	English					✓					
Alcott, Alwyn	8	English					✓					
Aldridge, Courtney	9	English					✓					
Allfrey, Trista	8	English					✓					
Allen, Megan	13	English					✓					
<b>Total</b>	1016		1016	0	0	0	1015	0	1	0	0	

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

## Bulk Updating Data for a Selection of Students

There are two methods for selecting a number of students.

### Entering a Value for a Selection of Students

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

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

### Entering a Value for Sequentially Listed Students

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

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

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

## Recording Leavers and Re-Admissions

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

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

### Recording a Leaver

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

Name	Year Group	Reg. Group	Adm. No.	Date of Admission	Date of Leaving	Reason for Leaving	Destination

2. Ensure that the **Status** of **On Roll** is selected.

3. Click the **Search** button to display a list of all on-roll students.

Name	Year Group	Reg. Group	Adm. No.	Date of Admission	Date of Leaving	Reason for Leaving	Destination
Abdess, Graham	8	8A	004504	03/09/2014			
Abbey, Grenetta	11	11F	003979	01/09/2011			
Abbey, Jimmy	13	G	003599	01/09/2009			
Abbey, Sean	8	8B	004505	03/09/2014			
Abbot, Andrew	10	10E	004163	03/09/2012			
Abbot, Benjamin	11	11A	004161	31/10/2011			

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

Name	Year Group	Reg. Group	Adm. No.	Date of Admission	Date of Leaving	Reason for Leaving	Destination
Abdess, Graham	8	8A	004504	03/09/2014			

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

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

**IMPORTANT NOTE:** It is recommended that Year 11 students are not given a **Date of Leaving** until it is confirmed that they will actually be leaving the school at the end of the Summer term and are not returning to Year 12.

For students who stay on for Year 12, without a gap in learning from Year 11, the DfE expects their **Date of Admission** to be the same as it was when the student was in Year 11. It is also expected that no date of leaving was recorded for the end of Year 11.

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

## 04| Preparing Student Level Information

7. Enter the **Destination after Leaving** if known, e.g. the name of the next school.
8. Select the **Learning Aim Withdrawal Reason** from the drop-down list, e.g. **Other Provider, Illness/Injury, Personal**, etc. to explain why the student is leaving the learning aim before the expected end date.
9. Assign the information to the applicable students by either:
  - highlighting the students to whom this information applies then clicking the **Assign to Selected** button; or
  - if the information applies to all the students in the list, clicking the **Assign to All** button.

**Manage Student(s) Leaving Details**

Save Print

1 Leaving Information 2 Students

**1 Leaving Information**

Date of Leaving: 12/12/2015 Reason for leaving: Elective Home Education Assign to All

Destination after Leaving: Home Address Assign to Selected

Learning Aim Withdrawal Reason: Injury/Illness

**2 Students**

Name	Year Group	Reg. Group	Adm. No.	Date of Admission	Date of Leaving	Reason for Leaving	Destination	Remove
Abbess, Graham	8	8A	004504	03/09/2014	12/12/2015	Elective Home Ed...	Home Address...	Clear

10. To remove a student from the **Students** list, highlight their name and then click the **Remove** button.
11. To clear the contents of the **Date of Leaving, Reason for Leaving** and **Destination after Leaving** fields, highlight the required student(s) then click the **Clear** button. Re-enter the information as required.

*NOTE: Although the information displayed in the **Learning Aim Reason** column is still displayed after clicking the **Clear** button, it will update automatically if a different reason is selected and assigned.*

12. Click the **Save** button.

**Completed**

## Re-Admitting a Student

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

*NOTES: Do not remove the leaving date, as the student's period of absence from the school will not be recorded.*

*However, if a student is intending to leave but subsequently changes their mind and decides not to leave, the date of leaving can be removed, as continuous attendance has been maintained.*

1. Select **Focus | Student | Student Details** to display the **Find Student** browser.
2. Click the **New** button to display the **Add Student** page. It is necessary to enter limited information here as you know that the person already exists.
3. Click the **Continue** button to display a list of **Matched People**, based on the criteria entered on the **Add Student** page.
4. Highlight the required student then click the **Open** button. The following warning message is displayed:  
**The selected student is a leaver. Do you want to re-admit the student?**
5. Click the **Yes** button if you are certain that this is the student who should be re-admitted. Their details are displayed on the **Student Details** page.
6. Complete the mandatory fields (**Date of birth, Gender, Year Group, Enrolment Status, Year Taught In** and **Admission Date**) and check any other details that may have changed since they were last on-roll, such as their address.
7. Check that the original **UPN** is displayed.  
 If it did not previously exist, generate a new **UPN** by clicking the button adjacent to the **UPN** field to display the **Issue UPN** dialog.  
 Select either the **Issue Permanent** or **Issue Temporary UPN** radio button then click the **OK** button to return to the **Registration** panel.  
 The temporary/permanent UPN is issued on save.
8. Click the **Save** button to re-admit the student.

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

Completed

## Deleting Unwanted Student Records

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

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

Completed



## Checking a Student's Basic Details

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

The following information is collected in the return:

- **Legal Forename** (mandatory information in SIMS)
  - **Middle Names**
  - **Legal Surname** (mandatory information in SIMS)
  - **Former Surname**
  - **Preferred Surname** (mandatory information in SIMS)
  - **Gender** (mandatory information in SIMS)
  - **Date of Birth** (mandatory information in SIMS).
1. Select **Focus | Student | Student Details** to display the **Find Student** browser.
  2. Search for then double-click the name of the required student to display the **Student Details** page.

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

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

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

**Completed**



### More Information:

*Recording a Student's Change of Surname on page 31*

## Recording a Student's Change of Surname

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

1. In the **Basic Details** panel, edit the student's **Legal Surname**.
2. Click the **Save** button. The following message is displayed:  
**Is this a correction to the name or a legal change to the student's name? If it is a legal change, please select Yes.**
3. Click the **Yes** button to display the **Reason For Change** dialog.

4. Select the applicable **Reason** for change from the drop-down list. This entry is optional but is recommended to maintain a complete history of name changes.
5. The **Date of Change** defaults to today's date but can be amended by clicking the **Calendar** button and selecting an alternative date, if required.
6. Click the **OK** button to return to the **Basic Details** panel.
7. Click the **Save** button.
8. To view a list of the student's previous names, click the **History** button to display the **Previous Names for** dialog.

Legal Forename	Middle Name(s)	Legal Surname	Reason	Date Of Change
Jimmy	James	Abbey	Marriage (1)	30/03/2016
Chris		Smith	Adoption	24/12/2013

9. Click the **Cancel** button to return to the **Basic Details** panel.

 **Completed**

## Checking Registration Details

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

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

### Checking Enrolment Status, Admission Date and Boarder Status

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

- **Enrolment Status** (mandatory information in SIMS)
  - **Admission Date** (mandatory information in SIMS)
  - **Boarder Status.**
1. Select **Focus | Student | Student Details** to display the **Find Student** browser.
  2. Search for then double-click the name of the required student to display the **Student Details** page.
  3. Click the **Registration** hyperlink to display the **Registration** panel.

2 Registration							
Registration Group	11F	House	Hooke				
Year Group	Year 11	Year Taught In	Curriculum Year 11				
Enrolment Status	Single Registration	Boarder Status					
Admission Date	01/09/2011	Admission Number	003979				
Former UPN		Attendance Mode	All day				
UPN	B823432110001	Local UPN					
Unique Learner Number	1111171873	Exam Number	1000				
UCI	951370141000C						
Part Time Details	<table border="1"> <thead> <tr> <th>Start Date</th> <th>End Date</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> </tr> </tbody> </table>		Start Date	End Date			New Open Delete
Start Date	End Date						
			History				

4. Check the student's **Enrolment Status**. Select the correct enrolment status from the drop-down list, if required.

5. Ensure that the **Admission Date** is correct. Edit the date or click the **Calendar** button and select a different date, if required.
6. Check the **Boarder Status**. Select the correct boarder status from the drop-down list, if required.
7. Click the **Save** button.



## Checking Unique Pupil Numbers

The following information is collected in the return:

- **UPN**
- **Former UPN** (this is a read-only field, which is automatically populated if the UPN is changed).

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

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

2 Registration			
Registration Group	11F	House	Hooke
Year Group	Year 11	Year Taught In	Curriculum Year 11
Enrolment Status	Single Registration	Boarder Status	
Admission Date	01/09/2011	Admission Number	003979
Former UPN		Attendance Mode	All day
UPN	B823432110001	Local UPN	
Unique Learner Number	1111171873	Exam Number	1000
UCI	951370141000C		
Part Time Details	Start Date	End Date	
			<input type="button" value="New"/> <input type="button" value="Open"/> <input type="button" value="Delete"/>
			<input type="button" value="History"/>

UPNs should be entered in the **UPN** field. Ensure that the format is valid (the field will turn red if invalid).

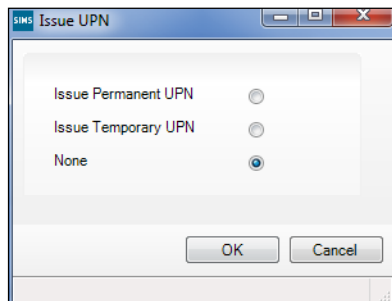
- **Permanent UPNs** are issued to a new student only when it is believed that they have never previously been allocated a UPN or to replace a temporary UPN.
- **Temporary UPNs** are issued to a student when the permanent UPN is not known to the school, e.g. awaiting transfer file/applicant's information. A temporary UPN can be recognised by the letter after the UPN number, e.g. H82020010701A.

#### 04 | Preparing Student Level Information

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



Generate UPN button



5. Select either the **Issue Permanent UPN** or **Issue Temporary UPN** radio button.
6. Click the **OK** button to return to the **Registration** panel.  
The UPN is generated automatically when the record is saved and the previous UPN is displayed in the **Former UPN** field, if applicable.
7. Click the **Save** button.

*NOTE: A student who is adopted after being allocated a UPN is often issued with a new permanent UPN. However, the exact process may vary depending on the circumstances and the guidance issued by your LA/DfE.*

*For information about issuing a new UPN for an adopted child, please seek advice from your LA, if applicable.*

*DfE guidance is also available on the GOV.UK website*

*(<https://www.gov.uk/government/publications/unique-pupil-numbers>).*



Completed

### Checking Unique Learner Numbers

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

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

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

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

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

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

4. Check the content of the **Unique Learner Number** field. Enter the 10-digit identifier, if not currently displayed.

*NOTE: The **UCI** (Unique Candidate Identifier) and **Exam Number** fields are displayed. These are read only and are populated from the information held in Examinations Organiser.*

5. Click the **Save** button to save any changes, if applicable.

**Completed**

## Checking Student's Part-Time Details

Part-time details apply mostly to Nursery schools (or schools with nursery age children) and Primary schools with Reception years. However, any student can be marked as part-time if their attendance is anything less than 10 sessions per week.

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

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

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

## 04 | Preparing Student Level Information

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

**2 Registration**

Registration Group	11F	House	Hooke
Year Group	Year 11	Year Taught In	Curriculum Year 11
Enrolment Status	Single Registration	Boarder Status	
Admission Date	01/09/2011	Admission Number	003979
Former UPN		Attendance Mode	All day
UPN	B823432110001	Local UPN	
Unique Learner Number	1111171873	Exam Number	1000
UCI	951370141000C		
Part Time Details	Start Date    End Date		New Open Delete

History

- Check the details displayed in the **Part Time Details** section. A minimum of a **Start Date** must be shown.
- Part-time details can be added by clicking the **New** button to display the **Add Part-time Attendance** dialog.

SIMS Add Part-time Attendance

Start Date: 30/03/2016

End Date: 02/07/2016

OK Cancel

- Enter a minimum of the **Start Date** then click the **OK** button to return to the **Registration** panel.
- Click the **Save** button to save any changes.

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

Completed

## Checking Special Educational Needs Information

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

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

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

1. Select **Focus | Student | Special Educational Needs** to display the **Find SEN Student** browser.
2. Select the required **SEN Status** from the drop-down list. Additional search criteria can be selected, if required, e.g. **Year Group**.
3. Click the **Search** button to display a list of students who match the criteria.

Name	Year Group	Reg. Group	House	Gender	SEN Status
Nimad, Carina	8	8B	Hooke	Female	M - Monitor Language Skills
Alim, Farah	8	8C	Curie	Female	M - Monitor Language Skills
Bagnall, Keith	7	7C	Hooke	Male	A - School/Early Years Action
Bandaras, Jose	8	8D	Curie	Male	M - Monitor Language Skills
Bandaras, Maria	8	8E	Flemming	Female	M - Monitor Language Skills
Basra, Jill	9	9F	Flemming	Female	S - Statement
Borgia, Matt	11	11C	Curie	Male	A - School/Early Years Action
Candy, Molly	9	9B	Boyle	Female	P - School/Early Years Action+



**04 | Preparing Student Level Information**

1. Double-click the name of the required student to display the **Student SEN details** page.
2. Click the **Basic SEN Details** hyperlink to display the **Basic SEN Details** panel.

**3 Basic SEN Details**

Status:  Start Date:  New Edit

Statement Pending?

Current Needs

Rank	Start Date	Need Type	Description
1	05/02/2015	Speech, Language or Communication Need	As English is Tamwar...
2	10/02/2016	Hearing Impairment	Slightly deaf in left ear

Full Descriptions

Attachment	Summary	Type	Owner
	IEP May 2015	SEN Document	Grosvenor Gillian

Additional Support:

Curriculum and Teaching Methods:

Grouping and Support:

Advice and Assessment:

Specialised Resources:

3. Ensure that the SEN **Status** and **Start Date** are correct.  
 To amend an error in the current **Status** or **Start Date**, click the **Edit** button. Select the required **Status** from the drop-down list and edit the **Start Date**, if required.  
 Alternatively, click the **New** button. This removes the original **Status** and the **Start Date** defaults to today's date. Select the applicable **Status** and change the **Start Date**, if required.

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

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

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

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

**Completed**

## Checking National Curriculum Year Groups

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

For the School Census Autumn 2016 Return, the collection of data uses the Age at Date as at 31/08/2016 with one exception. The collection of attendance data uses the Age at Date as at 31/08/2015.

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

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

## 04 | Preparing Student Level Information

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

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



### Additional Resources:

*Managing Pupil/Students handbook*  
*Setting up and Administering SIMS handbook*

## Checking the Student's Year Taught In Record

**Year Taught In** is mandatory information in SIMS.

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

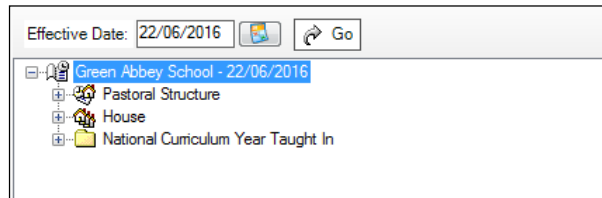
2 Registration			
Registration Group	11F	House	Hooke
Year Group	Year 11	Year Taught In	Curriculum Year 11
Enrolment Status	Single Registration	Boarder Status	
Admission Date	01/09/2011	Admission Number	003979
Former UPN		Attendance Mode	All day
UPN	B823432110001	Local UPN	
Unique Learner Number	1111171873	Exam Number	1000
UCI	951370141000C		
Part Time Details	Start Date   End Date		New Open Delete
			History

4. Ensure that the **Year Taught In** field displays the actual National Curriculum year in which the student is taught the majority of the time. Select a different year from the drop-down list, if required.

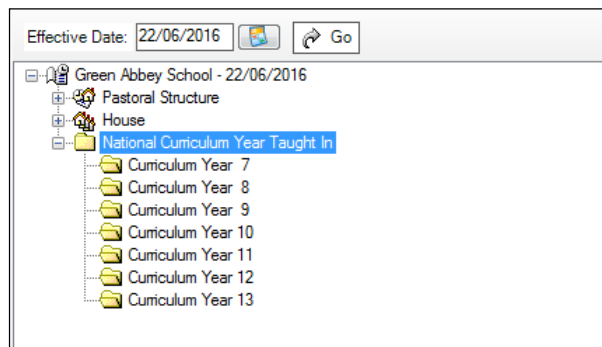
**NOTE:** Any change made in the **Registration** panel is effective from today's date. If the **Year Taught In** change was applicable from an earlier date, click the **History** button and apply the change from the actual date the change is required.

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

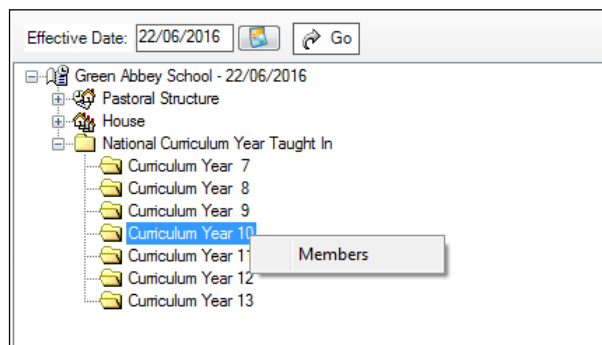
1. Select **Focus | School | Pastoral Structure | Current Structure** to display the **Current Academic Year Pastoral Structure** page.
2. Click the **Go** button.



3. Expand the **National Curriculum Year Taught In** folder by clicking the **+** icon or double-clicking the folder name. The curriculum years are displayed.

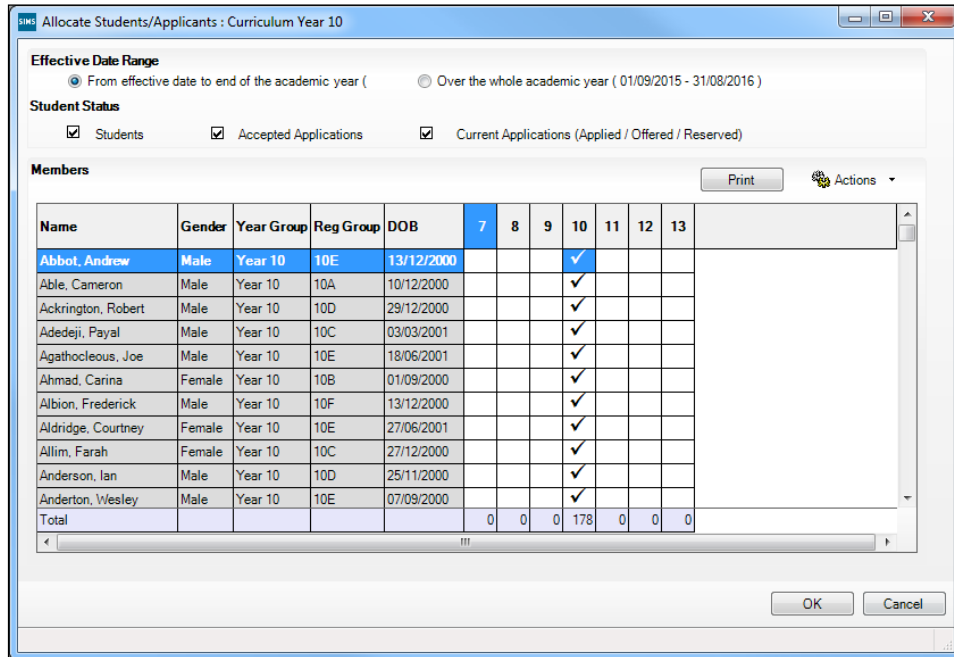


4. Right-click the required curriculum year folder and then select **Members** from the pop-up menu.



**04| Preparing Student Level Information**

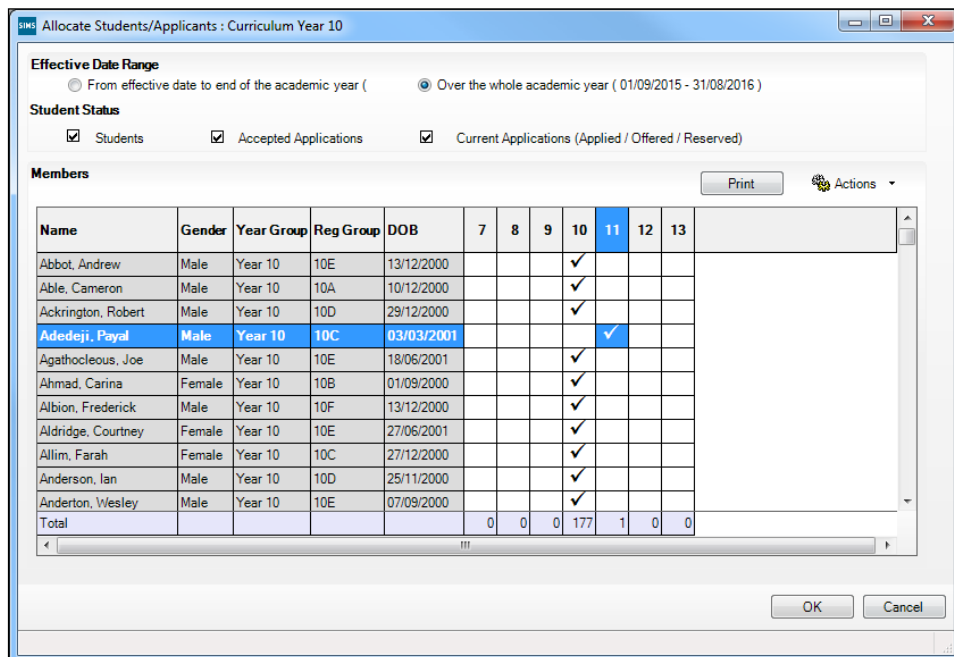
The **Allocate Students/Applicants** dialog is displayed.



5. Ensure that the **Effective Date Range** is changed to **Over the whole academic year** by selecting the radio button.
6. To change a student's memberships of the **National Curriculum Year Taught In**, click the applicable cell in the grid.

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

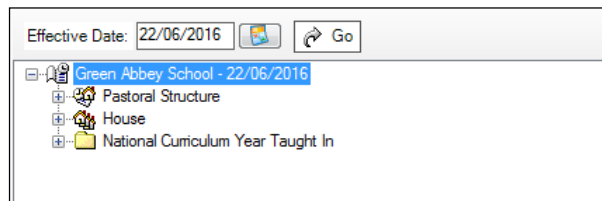
The following graphic shows that one **Year 10** student is taught in Year **11**.



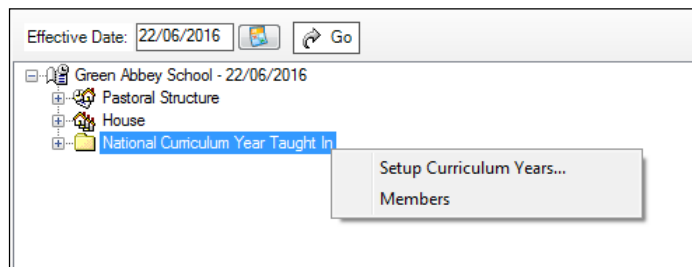
7. Ensure that all students are allocated membership to the correct **National Curriculum Year Taught In** and then click the **OK** button to return to the **Current Academic Year Pastoral Structure** page.
8. Repeat for the other curriculum years, where applicable.
9. Click **Save** button.

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

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

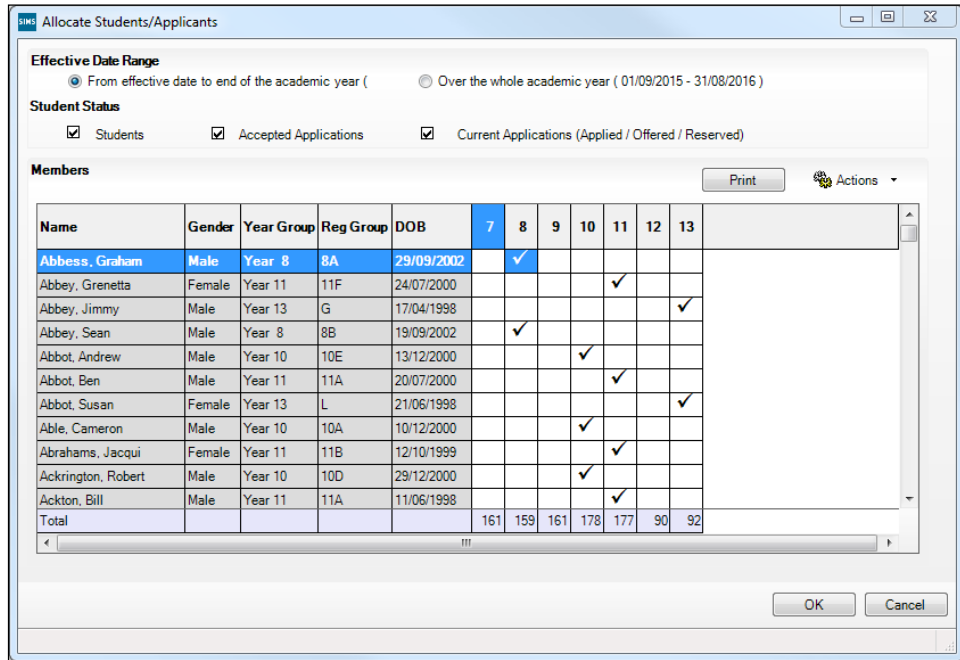


3. Right-click the **National Curriculum Year Taught In** folder and then select **Members** from the pop-up menu.

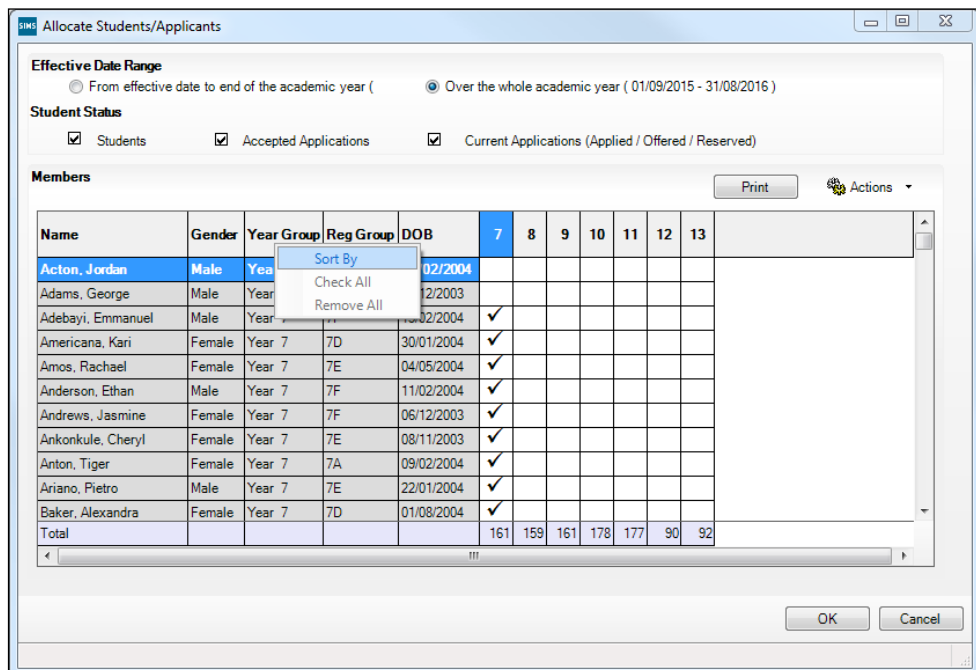


**04 | Preparing Student Level Information**

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



4. Ensure that the **Effective Date Range** is changed to **Over the whole academic year** by selecting the radio button.  
By default, the records are displayed in alphabetical surname order. Sorting the names in year group order assists in locating students who do not have a **Year Taught In** selected.
5. Right-click the **Year Group** heading then select **Sort By** from the pop-up menu. Any students who have not been allocated a year taught in are displayed at the top of the list.



6. Indicate which year the students with missing years are taught in by clicking the applicable cell in the grid.
7. Make any required changes for the other students.
8. Click the **OK** button then click the **Save** button.



Completed

## Checking Home Address Information

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

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

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

The Unique Property Reference Number (**UPRN**) for on-roll students and leavers is collected for the first time in the School Census Autumn 2016 Return. UPRN a unique identifier (reference number) that links together related address records across different software programmes. This enables organisations to collate and share information based on a common reference number.

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

**3 Addresses** History

Current Home Address Details (Validated)

Address: Dalwood Lodge  
1 Ely Road  
Milton  
Cambridge  
CB24 6DD  
United Kingdom  
UPRN: 10003191315

Delete  
 Modify Address  
 Move House  
 Validate

Note:

Start date:  End date:

Enter additional address

Post Code:  Country:

House Number/Name:

Search Validation Service  Search Existing Addresses

Continue Advanced



#### 04 | Preparing Student Level Information

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

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

5. If the Unique Property Reference Number (**UPRN**) is not displayed below the **Current Home Address Details**,
  - a. Click the **Validate** button to display the **Find Matching Addresses** dialog.
  - b. Highlight the required address then click the **OK** button to return to the **Addresses** panel, where the **UPRN** is displayed below the address.
6. If you have edited the address, click the **Save** button.
7. If the student has an additional current address, i.e. a **Second Home**, enter the additional address then click the **Continue** button (adjacent to the address) to display the **New Address Details** panel.
8. Enter the remaining address details and the **Address Type** then click the **Save** button to refresh the display.

**Completed**

## Checking Free School Meals Eligibility

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

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

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

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

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

- Click the **Dietary** hyperlink to display the **Dietary** panel.

**6 Dietary**

Meal Patterns

Start Date	End Date	Mon	Tue	Wed	Thu	Fri	
01/09/2014	31/08/2015	SM	SM	SM	SM	SM	

Eligible for Free Meals

Start Date	End Date	Country	Notes
15/09/2014		England	

FSM Review Date: 31/08/2015

- Ensure the minimum of a **Start Date** and **Country** are displayed in the **Eligible for Free Meals** panel. If you need to edit the data, highlight the required record then click the **Open** button.  
If a new record is required, click the adjacent **New** button to display the **Add Student Free Meals Details** dialog.

**SIMS Add Student Free Meals Details**

Start Date: 02/02/2016

End Date:

Country: England

Notes:

OK Cancel

- Enter the **Start Date** (and **End Date** if available) for the free meal period, as supplied by your Local Authority.
- Ensure that the UK **Country** in which the eligibility applies is correct. Select from the drop-down list, if required.
- Notes can be entered, if required.
- Click the **OK** button to return to the **Dietary** panel, where the new information is displayed.
- Click the **Save** button.

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

 **Completed**

## Checking Ethnic and Cultural Information

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

- **First Language**
  - A First Language other than English should be recorded where a student was exposed to the language during early development and continues to be exposed to this language at home or in the community.
  - If the child was exposed to more than one language (which may include English) during early development, the language other than English should be recorded, irrespective of the student’s proficiency in English.
- **Country of Birth**
- **Nationality (Nation)**
- **Proficiency in English** – collected only where the pupil’s language code indicates that the pupil’s first language is other than English.

Teachers assess these pupils according to the impact that their Proficiency in English has on their ability to engage with full class activities (and the corresponding level of support that the pupil requires).

1. Select **Focus | Student | Student Details** to display the **Find Student** browser.
2. Search for then double-click the required student to display the **Student Details** page.
3. Click the **Ethnic/Cultural** hyperlink to display the **Ethnic/Cultural** panel.

4. Select the student’s **First Language** from the drop-down list.
5. Select the student’s **Country of Birth**:
  - a. Click the **Browse** button to display the **Nation Browse** dialog.
  - b. Highlight the required country then click the **OK** button to return to the **Ethnic/Cultural** panel.

6. If the student's Nationality is not recorded:
  - a. Click the **New** button adjacent to the **Nationality and Passport Details** section to display the **Add Student Nationality** dialog.
  - b. In the **Nation Details** panel, click the **Browse** button to display the **Nation** browser.
  - c. Highlight the required nation then click the **OK** button to return to the **Add Student Nationality** dialog.
  - d. Enter **Passport Detail**, if known.
  - e. Enter **Tier4 Details**, if applicable to your school.
  - f. Click the **OK** button to the **Ethnic/Cultural** panel.
7. Ensure that the student's **Proficiency in English** record is up-to-date:
  - a. Click the **New** button adjacent to the **Proficiency in English** section. Alternatively, highlight an existing record then click the **Open** button to display the **Edit Proficiency in English** dialog.
  - b. Enter the required **Date of Assessment** or select the required date from the Calendar.
  - c. Select the **Level** from the drop-down list.
  - d. Click the **OK** button to the **Ethnic/Cultural** panel.
8. Click the **Save** button.

**TIPS:**

*It is possible to bulk update **First Language, Country of Birth, Proficiency in English** and **Pupil Nationality** for a selected group of students by selecting the relevant option from the **Data Item** drop-down list via **Routines | Student | Bulk Update**.*

*Home language is no longer collected in the School Census. Users with School Administrator permissions can remove the **Home Language** field from the **Student Details** and **Application** pages, if required. This is achieved by selecting the **Hide Home Language** check box in the **School Options** panel via **Tools | Setups | School Options**.*

*Home language is always included in CTF imports, CTF exports and the Reporting Dictionary, even if it is not displayed on the **Student Details** and **Application** pages.*

Completed

## Checking Additional Information

Ensure that the **Youth Support Services Agreement (YSSA)** status is recorded in SIMS.

It applies to students between age 12 and 25 with special educational needs and students between age 12 and 20 with no special educational needs.

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

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

## 04 | Preparing Student Level Information

2. Search for then double-click the required student to display the **Student Details** page.
3. Click the **Additional Information** hyperlink to display the **Additional Information** panel.

Meals	Modes of travel	Service Children in Education	Uniform Allowance	Pupil Premium Indicator for year 2015/2016	Notes	Recoupment	Youth Support Services Agreement	Route	LA Provided Transport	Source of Service Children in Education
<input type="checkbox"/> Free Meal	<input type="checkbox"/> Boarder - not applicable	Yes	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Waiting for documentation from relevant parties.		Obtained		<input checked="" type="checkbox"/>	Provided by the parent
<input type="checkbox"/> Home	<input type="checkbox"/> Bus (type not known)									
<input type="checkbox"/> Sandwiches	<input checked="" type="checkbox"/> Car Share (with child/children)									

Learner Support Code	Award Date	Notes
Vulnerable Group Bursary Awarded	13/07/2015	

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

*NOTE: YSSA replaced Connexions Assent.*

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

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

6. Click the **Save** button.

**Completed**

## Preparing Exclusions Information

Exclusions information is required for students who were subject to any exclusion with a start date during the period 01/01/2016 to 27/03/2016 inclusive. Exclusions should not be counted if the Head Teacher withdrew them, or if the student was re-instated by the Discipline Committee or an independent Appeal Panel.

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

- Exclusion **Type** (category, e.g. fixed period, lunchtime or permanent).
- Exclusion **Reason** (select one code to provide the main reason).
- Exclusion **Start Date**.

- Actual number of sessions (**Length**) - required for fixed period and lunchtime exclusions.
- SEN Provision (please see *Checking Special Educational Needs Information* on page 37).

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

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

- SEN Status (if applicable)
- Ethnicity
- Ethnic Source
- Part-time indicator (if applicable)
- Date of Admission.

## Recording an Exclusion

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

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

**04 | Preparing Student Level Information**

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

The screenshot shows the 'Add Exclusion' dialog box with the following fields and sections:

- Exclusion Details:** Type (dropdown), Reason (dropdown), Start Date (calendar), End Date (calendar), Start Time (dropdown), End Time (dropdown), Part Time Exclusion (checkbox), Length School Days (text input), Calculate (button).
- Comments:** Text area.
- Agency Involved:** Text input.
- Academic Year:** Text input, **Term:** Text input.
- Discipline Committee:** Committee Date (calendar), Committee Result (dropdown), Reinstatement Date (calendar), Parents Representation (checkbox).
- Appeal Details:** Appeal Received (checkbox), Appeal Date (calendar), Appeal Result (dropdown), Result Date (calendar), Reinstatement Date (calendar).
- Notes/Documents:** Table with columns: Attachment, Summary, Type, Owner, Last Modified. Includes buttons: New, Open, Delete.
- Buttons:** OK, Cancel.

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

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

**Exclusion Details**

Type: Fixed Term Reason: Verbal abuse/threatening behav

Start Date: 08/07/2015 End Date: 08/07/2015

Start Time: AM End Time: PM

Part Time Exclusion:  Length School Days:  **Calculate**

Comments: Ongoing bullying against other members of the class.

Agency Involved:

Academic Year: Academic Year 2014/2015 Term: Summer Term

Discipline Committee

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

**Exclusion Details - Graham Abbas**

Save Undo Print Links Help Unpin Close

Academic Year	Term	Start Date	End Date	Length	Exclusion Type	Exclusion Reason
Academic Year 2015/2016	Summer Term	21/06/2016	21/06/2016	1	Fixed Term	Verbal abuse/threatening behaviour against a pupil

New Open Delete

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

- Click the **Save** button to save the exclusion.  
For more information about exclusions, please refer to the DfE website (<http://www.education.gov.uk/schools/pupilsupport/behaviour/exclusion>).

**Completed**



## Checking Early Years Data

All two, three and four year old pupils funded through the funded hours entitlement are eligible for a maximum of 15 funded hours a week.

Date of Birth Ranges	Phase and Year Group	Minimum Entitlement to Funded Hours
01/09/2012 and 31/08/2014 inclusive	All relevant schools and year groups	15 hours
01/09/2011 and 31/08/2012 inclusive	Nursery schools – all year groups All schools (excluding Nursery schools) – National Curriculum Year groups E1, E2, N1 and N2 only. <i>NOTE: No longer applies to Reception (R).</i>	15 hours

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

Census		Pupils View								
Term	Autumn 2016	Age at	All	YTI	All	Reg	All	Status	All	
Name	Date of Birth	Gender	AdNo.	YTI	Reg	Age at 31/08/2016	Age at 31/12/2016	Hours at Setting	Funded Hours	
Adams, Nancy	18/12/2011	Female	001460	N2	PM	4	5	15	15	
Alala, Candis	02/10/2011	Female	001461	N2	ELM	4	4	15	15	
Broz, Konrad	12/01/2012	Male	001462	N2	ELM	4	4	15	15	
Carlton, Eleanor	15/05/2012	Female	001463	N2	PM	4	4	15	15	
Chaban, Julia	16/05/2012	Female	001464	N2	PINE	4	5	15	15	
Collins, Rebek	10/04/2012	Male	001465	N2	ASU	4	4	15	15	

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

**IMPORTANT NOTES:** A value between 0 and 99.5 must be entered for each pupil. 0 (zero) is a valid value. If the value entered is within this range but higher than expected by the DfE, a validation error is displayed when the return is created and validated. An explanation as to why the value is higher should be recorded on the COLLECT Portal.

Hours must be entered in increments of 0.5 only.

If any cell in either the **Hours at Setting** or **Funded Hours** column is left blank, a validation error is displayed when the return is created and validated. Enter a value between 0 and 99.5.

3. If most of the pupils are receiving the same number of hours, the following method can be used to quickly populate the column:
  - a. In the **Pupils View** panel, select the required year group from the **YTI** (Year Taught In) drop-down list. Only the selected pupils are displayed in the **Pupils** panel.
  - b. Right-click in the **Pupils** panel then select **Select All** from the drop-down list.
  - c. Click in one of the highlighted cells of the column you wish to populate, i.e. **Hours at Setting** or **Funded Hours**, then enter the number of hours that is applicable to the majority of pupils.  
This number is then entered automatically for the remaining pupils.
  - d. Click to the right of the grid to deselect all.
  - e. Edit the entry for each pupil who is receiving a different number of hours. This is achieved by highlighting the required pupil, clicking in the associated **Hours at Setting** or **Funded Hours** cell as applicable, then entering the required number.

4. Click the **Save** button.

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



### Identifying which Children have no Hours Recorded

1. On the **Census Return Details** page, click the **Edit** button (located in the **Early Years** panel) to display the **Update Early Years** page.
2. In the **Pupils View** panel, ensure that the required **Age at date**, **YTI** and **Reg** group are selected then select **No Hours at Setting** (or **No Funded Hours**) from the **Status** drop-down list.  
Only pupils who do not have an entry for **Hours at Setting** (or **Funded Hours**) are displayed.
3. Enter the required values for these pupils as described previously.
4. Click the **Save** button.

## Updating Students with Top-Up Funding

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

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

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

**Update Students with Top-up Funding**

Update

---

Term:  Students On-Roll on Census Day

Surname:  Forename:  YTI:  Reg:

Preferred Surname:  SEN:  Ever in care at this school:

Top-up Funding

Surname	Preferred Surname	Forename	YTI	Reg	SEN	Ever in Care
▶ Abbess	Abbess	Graham	9	9A	E	No
Bristol	Bristol	Andrew	11	11C		Yes
Whiting	Whiting	Kellyann	11	11E		No

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

Term: Autumn 2016 Students On-Roll on Census Day

Surname: smith Forename: YTI: 8 Reg: All

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

Surname	Preferred Surname	Forename	YTI	Reg	SEN	Ever in Care
▶ Smith	Smith	Daniel	8	8C	E	No
Smith	Smith	Jade	8	8A		No
Smith	Smith	Osias	8	8A		No
Smith	Smith	Stephanie	8	8A		No
Smith	Smith	Trinity	8	8E		Yes
Smith	Smith	Tristan	8	8A		No

Top-up Funding Add Remove

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

Term: Autumn 2016 Students On-Roll on Census Day

Surname: smith Forename: YTI: 8 Reg: All

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

Surname	Preferred Surname	Forename	YTI	Reg	SEN	Ever in Care
▶ Smith	Smith	Jade	8	8A		No
Smith	Smith	Osias	8	8A		No
Smith	Smith	Stephanie	8	8A		No
Smith	Smith	Tristan	8	8A		No

Top-up Funding Add Remove

Surname	Preferred Surname	Forename	YTI	Reg	SEN	Ever in Care
▶ Abbes	Abbes	Graham	9	9A	E	No
Bristol	Bristol	Andrew	11	11C		Yes
Whiting	Whiting	Kellyann	11	11E		No
Smith	Smith	Daniel	8	8C	E	No
Smith	Smith	Trinity	8	8E		Yes

#### 04 | Preparing Student Level Information

- To remove a student from the list, highlight the required student then click the **Remove** button. The student's record is displayed in the first table, providing a chance to reselect the student, if required.
- Click the **Update** button to save the data and arrange the list of students in **Surname** order.

Completed

## Updating Students Post Looked After Arrangements

Post Looked After Arrangements (previously named Adopted from Care) is collected for students who are on-roll on census day (06/10/2016) and is then used for funding purposes.

The values available for selection enable schools to indicated which students were looked after immediately before adoption or prior to being the subject of a residence or special guardianship order. However, those who have parental responsibility are not obliged to provide this information to the school.

- Select **Tools | Statutory Return Tools | Update Post Looked After Arrangements** to display the **Update Students Post Looked After Arrangements** page.

Any students currently recorded as having post looked after arrangements are displayed in the second panel.

Update Students Post Looked After Arrangements

Update Links Help Close

Term: Autumn 2016 Students On-Roll on Census Day

Surname: Forename: YTI: All

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

Post Looked After Arrangements Add Remove

Surname	Preferred Surname	Forename	YTI	Reg	Ever in Care	PLAA	Evidence Obtained
De Souza	De Souza	Luciano	12	Yes		Ceased to be looked after through Adoption	<input checked="" type="checkbox"/>
Noble	Noble	Natasha	12	No		Ceased to be looked after through a Special Guardianship Order (SGO)	<input type="checkbox"/>

- Use the search criteria to locate the students you wish to record as having PLAA then highlight their details.

Term: Autumn 2016 Students On-Roll on Census Day

Surname: s Forename: d YTI: 13

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

Surname	Preferred Surname	Forename	YTI	Reg	Ever in Care
Sampson	Sampson	Delilah	13		No
Smith	Smith	David	13		No

Post Looked After Arrangements Add Remove

- Highlight the students who you want to define as having PLAA then click the **Add** button. The selected studenta are displayed in the second panel.

Post Looked After Arrangements Add Remove

Surname	Preferred Surname	Forename	YTI	Reg	Ever in Care	PLAA	Evidence Obtained
De Souza	De Souza	Luciano	12		Yes	Ceased to be looked after through Adoption	<input checked="" type="checkbox"/>
Noble	Noble	Natasha	12		No	Ceased to be looked after through a Special Guardianship Order (SGO)	<input type="checkbox"/>
Sampson	Sampson	Delilah	13		No	Ceased to be looked after through a Special Guardianship Order (SGO)	<input checked="" type="checkbox"/>
Smith	Smith	David	13		No	Ceased to be looked after through Adoption Ceased to be looked after through a Special Guardianship Order (SGO) Ceased to be looked after through a Residence Order (RO) Ceased to be looked after through a Child Arrangement Order (CAO)	<input type="checkbox"/>

- Ensure that the correct post looked after arrangement is displayed for each student by clicking the applicable **PLAA** cell then selecting the applicable status from the drop-down list:
  - Ceased to be looked after through Adoption**
  - Ceased to be looked after through a Special Guardianship Order (SGO)**
  - Ceased to be looked after through a Residence Order (RO)**
  - Ceased to be looked after through a Child Arrangement Order (CAO).**
- To remove a student from the list, highlight the required student then click the **Remove** button. The student's record is displayed in the first table, from where it can be reselected, if required.
- Select the **Evidence Obtained** check box, if documents have been obtained that provide evidence of the post looked after arrangements.

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

## 04 | Preparing Student Level Information

7. Click the **Update** button to save the information and arrange the names in surname order.

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

**Completed**

## Preparing Attendance Information

Summer term attendance data (including attendance codes and the number of sessions missed) should be provided for non-boarder students and leavers aged four to 15 inclusive on 31/08/2015, who were on-roll for at least one session during each Summer half term, i.e. from 28/03/2016 to 29/05/2016 and 30/05/2016 to 31/07/2016.

The attendance data collected in this return includes:

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

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

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

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

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

For information and advice about school attendance, please refer to the DfE website

(<http://www.education.gov.uk/schools/pupilsupport/behaviour/attendance>).



### Additional Resources:

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

**Completed**

## Preparing Post 16 Information in Course Manager

### Applicable to schools with a Sixth Form only

Learning Aims data is collected from English maintained Secondary/middle deemed Secondary and All-Through schools, Pupil Referral Units, CTCs and Academies that have sixth form students.

The Post 16 Learning Aims are collected only once a year (in the School Census Autumn Return) for students who were/are in National Curriculum Year Group (Year Taught In) 12 or above during the period from 01/08/2015 to 06/10/2016.

#### **IMPORTANT NOTES:**

*Learning Aims are collected for students for whom the school wishes to claim Post 16 funding from the Education Funding Agency (EFA). These students must be/have been in National Curriculum Year Group (Year Taught In) 12 or above during the previous/current academic year as stated previously.*

*Learners are expected to be in National Curriculum Year 12 and above if the majority of their learning is at level 3 or above.*

*Students in Actual National Curriculum Year Group 11 (or below) with the majority of their learning at level 2 are no longer included in the return.*

It is important to ensure that the information entered in Course Manager is up-to-date and accurate before starting the return.

When creating the School Census Autumn 2016 Return, the **Learning Aims** panel is provided to deal with the Post 16 information required for the return. Detailed information about the functionality provided in this panel is available in the *Producing the School Census Autumn 2016 Return (English Secondary and Middle deemed Secondary)* handbook.

A document dedicated to the preparation of Post 16 data (*Preparing Post 16 Data for the School Census Autumn 2016 Return* guide) can be accessed from the SIMS **Documentation Centre** or from My Account website (<https://myaccount.capita-cs.co.uk>) by using the search facility to find CENSUS16.

**Completed**



# 05 | What Next?

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

The SIMS 2016 Summer Release (7.170) must be installed before completing the School Census Autumn 2016 Return. However, it is advisable to check whether a later version of SIMS is available, then upgrade to the current release, if necessary.

You should now be ready to produce the final School Census Autumn 2016 Return.

## Where Can I Get More Information

In addition to this preparation guide, the following information is also available:

- *Producing the School Census Autumn 2016 Return (English Secondary/Middle deemed Secondary Schools) handbook*  
This handbook outlines the School Census process in SIMS for Secondary and Middle deemed Secondary schools.
- *Producing the School Census Autumn 2016 Return (English All-Through Schools) handbook*  
This handbook outlines the School Census process in SIMS for All-Through schools.
- *Producing the School Census Autumn 2016 Return (English Pupil Referral Units) handbook*  
This handbook outlines the School Census process in SIMS for Pupil Referral Units.
- *School Census Academic Year 2016/2017 Validation Errors and Resolutions document*  
This guide provides suggestions on how to resolve any validation errors or queries.
- *Preparing Post 16 Data for the School Census Autumn 2016 Return guide*  
This guide deals specifically with preparing Post 16 data for the School Census Return.
- *Managing Pupil/Students handbook*  
This handbook provides details about the processes that relate to the management of student data in SIMS.

You may also find the following DfE link helpful: School Census 2016 to 2017 guide for schools and LAs provided by the DfE (<https://www.gov.uk/government/publications/school-census-2015-to-2016-guide-for-schools-and-las>).

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

## 05| What Next?

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

Documentation is also available from the My Account website (<https://myaccount.capita-cs.co.uk>).

1. Click Knowledge Base and then SIMS Publications (located in the **Popular Searches** list on the right-hand side) to display a list of all SIMS publications.
2. To refine the search further, click **Documents** (located in the filter list on the left-hand side).
3. Select the required **Document type** (click **Show more** to view additional options, e.g. quick reference sheets, frequently asked questions, etc.).

The search results are displayed automatically.

### Tips for using the My Account Search Facility

Here are some key tips for using the search facility in My Account. For additional explanations, please refer to the My Account website.

- The search results can be refined further by using the advanced filters, e.g. **Sort by relevance** or **Sort by last modified, File type** and date range.
- Surround a phrase with "double quotes" to return results containing that exact phrase.
- Prefix words with **+** to make them essential.

For example: "end of year procedures" +primary

### Problem Solving

The My Account website also includes **Hot Topics** (a collection of articles from our **Knowledge Base** and other resources surrounding popular topical subjects such as preparing for the new school year) and the **Knowledge Base** (answers for queries already logged with our customer support desk, which can be searched for by keywords or Knowledge Base ID).

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

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