

Applicable to 7.172 onwards

Producing the School Census Spring 2017 Return

English Secondary and Middle
deemed Secondary Schools



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Overview

This handbook provides the information needed by Secondary schools, Middle deemed Secondary schools and Academies with Secondary phase in England to complete the School Census Spring 2017 Return, which takes place on Thursday 19 January 2017.

The School Census Spring 2017 Return is required to be completed by maintained Nursery schools, Primary schools, Middle schools, Secondary schools, All-Through schools, Special schools, Pupil Referral Units (PRUs), City Technology Colleges (CTCs) and Academies (including free schools) in England. Non-maintained Special schools are also required to submit the return.

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

A list of items collected from Secondary/Middle deemed Secondary schools in England for the School Census Spring 2017 Return is available in a later section of this handbook (please see *Preparing Data for the School Census Return* on page 8).

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



More Information:

Preparing Data for the School Census Return on page 8

How has the School Census Spring Return Changed?

- Census date is 19/01/2017
- Attendance collected from the start of the Autumn term (e.g. 01/09/2016) to 31/12/2016
- Exclusions collected from 28/03/2016 to 31/08/2016
- Free School Meals collected from 07/10/2016 to 19/01/2017
- Learner Support collected from 01/08/2016 to 19/01/2017.

Changes to the School Census Spring Return include the following:

Data Items New to the Spring Return

Focus | Student | Student Details

The following new data items (recorded in the **Ethnic/Cultural** panel) are collected in the School Census Spring 2017 Return:

- **Nationality**
- **Country of Birth**
- **Proficiency in English.**

The **UPRN** (Unique Property Reference Number), which is displayed below the address details in the **Addresses** panel once the address has been selected and validated, is also collected in the Spring return.



Additional Resources:

Managing Pupil/Students handbook



More Information:

Producing Detail Reports on page 38

Data Items Removed from the Census

Focus | School | School Details - Address panel

Focus | Student | Student Details - Welfare panel

The following data items are no longer collected for the return:

- **School Address**
- **In Care for exclusions.**

Classes at Selected Period on Census Day

Routines | Statutory Return | School Census

An editable **Reference Date** field has been added to the **Selected Period on Census Day** panel. This enables schools that have a timetable and are closed on census day to specify an alternative day and timetable period on which to collect class information for the return.



More Information:

Specifying the Selected Period on Census Day on page 14

School Address Details

Routines | Statutory Return | School Census

The school address is no longer collected for the return and has been removed from the **School Information** panel.

Childcare Information

Routines | Statutory Return | School Census Focus | School | School Details

One record for each of the four childcare types is required by the DfE, even if that childcare type is not provided. Therefore, the way in which childcare is recorded has been updated.

The **Childcare** panel now displays a separate row for each of the four childcare types.

The **Update Childcare Details** dialog now includes the following changes:

- **Site** has been renamed **On Site**, with a choice of **Yes** and **No** available for selection from the drop-down list.
- A new field is available for **Notes**, if required.

IMPORTANT NOTE: The information recorded in **School Details** for School Census Spring 2016 is incompatible with the requirement for School Census Spring 2017, so the details default to blank for all schools.

Therefore, all schools must enter the information ready for School Census Spring 2017. This means that even schools completely uninvolved with childcare will need to fill in eight items of information to indicate this position.



Additional Resources:

Setting up and Administering SIMS handbook



More Information:

Editing School Childcare Details on page 17

Early Years Pupil Premium Eligibility (EYPPE)

Routines | Statutory Return | School Census

The Early Years Pupil Premium Eligibility (EYPPE) has been separated from Hours at Setting and Funded Hours information, so that the correct cohorts are displayed for each of the data items collected in the return (three and four year olds only are considered for EYPPE, whereas funded hours also includes two year olds).

The **Early Years** panel now includes a second grid that deals with **Early Years Pupil Premium Eligibility**.

NOTE: Early Years information is collected only if applicable aged pupils exist at the school.

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:

Editing Students Post Looked After Arrangements on page 23

Admission Appeals

Routines | Statutory Return | School Census

The original **Admissions Appeals** panel has been split into three separate panels:

- **Infant Admissions Appeals**
- **Primary Admissions Appeals**
- **Secondary Admissions Appeals.**

The panels displayed depend on your school phase.

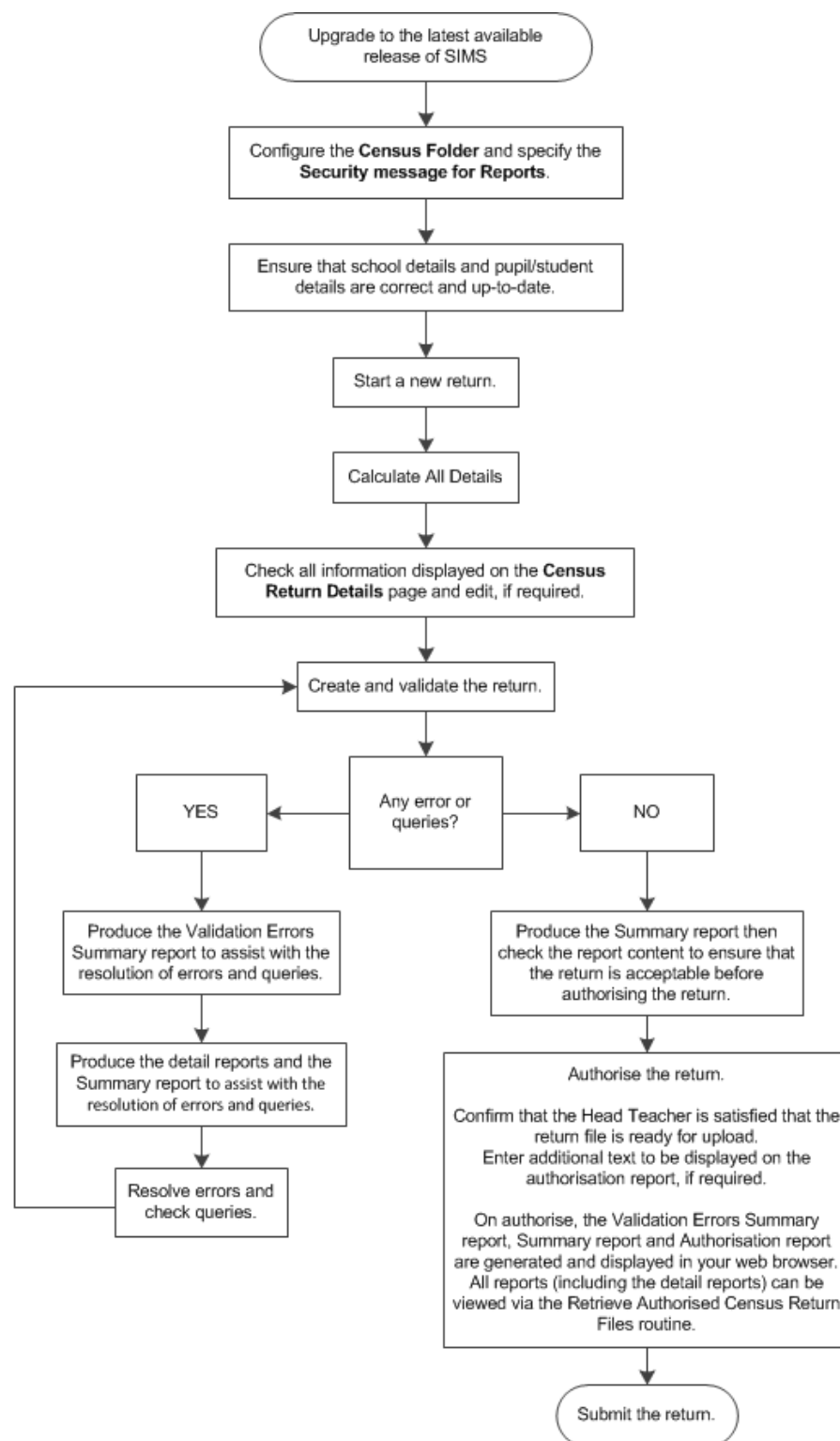


More Information:

Entering Secondary Admissions Appeals Totals on page 32

Steps to Producing the School Census Return

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



Where to Find More Information

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

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

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

1. Enter the required text in the **Search** field to display a list of documents that match the search criteria.
2. To refine the search further, click **Documents** and then select the required **Document type**, **File type** and/or **Date** range (click **Show more** to view additional options, if required).

Alternatively, click **SIMS Publications** (located in the **Popular Searches** list) to display a list of all SIMS publications.

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**.
- The following rules can be applied to your search terms:
 - Surround a word or phrase with "double quotes" to return results containing that exact phrase.
 - Prefix a words or phrases with **+** to make them essential.

For example: "end of year procedures" +primary +detailed

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

To access the School Census documents, please search for CENSUS17 in the SIMS **Documentation Centre** or My Account.

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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 <sims version> sims permissions, e.g. 7.172 sims permissions.

What Version of SIMS is Required?

To run the return, you must have the SIMS 2016 Autumn Release (7.172) 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 7.172 or later.



Preparing Data for the School Census Return

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

The following information is collected from Secondary/Middle deemed Secondary schools for the School Census Spring 2017 Return.

School Level Data

- School Characteristics: LA number, DfE establishment number, school name, school phase, school type, highest and lowest national curriculum year, intake type, governance, school email address and school telephone number.
- Secondary Admissions Appeals: lodged, withdrawn, heard by independent admissions committee, upheld (decided in parents' favour) and rejected.
- Student Reconciliation: part-time students not at school, private study students, students at another school, students on work experience and students at Further Education colleges.
- Class Information: class name, number of teachers in class, number of adult non-teachers in class, class year group, number of students from the host school in the class and number of students from other schools in the class.
- Miscellaneous:
 - free school meals taken
 - childcare provision on site, signposted off site childcare provision, type of childcare (e.g. before school, after school, etc.), opening time and closing time, number of childcare places, childcare provider, other schools and number of weeks that the childcare provision is open.

Student Level Data

- Student Identifiers: unique pupil number (UPN) and former UPN, unique learner number (ULN), surname, forename, middle names, former surname, preferred surname, gender and date of birth.
- Student Characteristics:
 - nationality, country of birth, proficiency in English, ethnicity, first language
 - free school meal eligibility start date and end date, UK country in which the eligibility applies
 - school dinner taken (this information is collected only if Reception, Year 1 and Year 2 pupils exist at the school)
 - Youth Support Services Agreement (YSSA) indicator, post looked after arrangements
 - service children in education indicator
 - learner support code, top-up funding indicator
 - funded hours, hours at setting (early years information is collected only if applicable aged pupils exist at the school).
- Student Status: enrolment status, date of entry, date of leaving, part-time indicator, boarder indicator and actual national curriculum year group.
- Special Educational Needs: SEN provision, SEN type ranking and SEN type for each SEN need, member of SEN unit (sometimes called special class) indicator, member of resourced provision indicator.
- Termly Exclusion Information (28/03/2016 to 31/08/2016): exclusion category, reason for exclusion, exclusion start date, actual number of sessions the student was excluded from and SEN provision (formerly stage).
- Student Home Address: student's home address details, including post code and unique property reference number (UPRN).
- Termly Attendance Information (from the start of the 2016 Autumn term to 31/12/2016): possible sessions, sessions missed due to authorised absence, sessions missed due to unauthorised absence, attendance codes (reason for absence) and number of sessions missed.

For more information and step by step instructions on the preparations that need to be carried out before the census return is produced, please refer to the *Preparing for the School Census Spring 2017* guide applicable to the phase of your school. The preparation guide, together with other useful School Census documentation, can be found on the My Account website (<https://myaccount.capita-cs.co.uk>) by using the search facility to find CENSUS17 documentation.

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Creating a New School Census Return

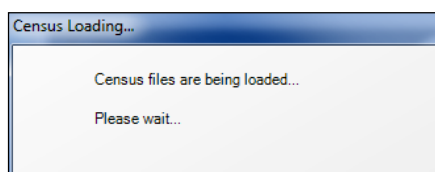
Before creating a new School Census return, ensure that all student and school information is present and accurate in SIMS.

The School Census Spring 2017 Return collects data for:

- all students on the register on 19/01/2017 (census day).
- any additional students not on-roll on census day who:
 - were on-roll for at least one session during the collection period from the start of the 2016 Autumn term to 31/12/2016.
 - had an exclusion that started between 28/03/2016 and 31/08/2016.
 - were awarded Learner Support funding from 01/08/2016 to 19/01/2017.

It is possible to create more than one return. This enables you to carry out dry runs to determine what data needs to be added or updated. Any unwanted returns can be deleted, providing they have not been authorised (please see *Deleting an Unauthorised Return* on page 51).

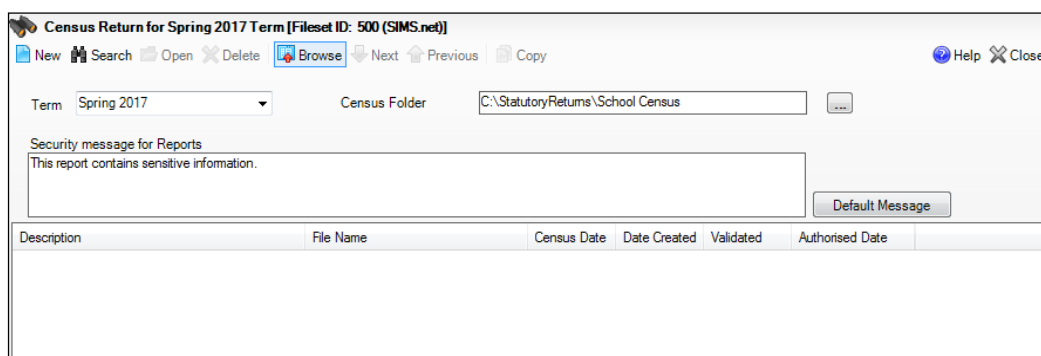
1. Select **Routines | Statutory Returns | School Census** to load the School Census validation and reporting files.



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

When the files are loaded, the **Census Return for Spring 2017 Term** browser is displayed.

The Fileset ID is displayed in the browser header for information only.



By default, the **Term** field displays the appropriate term for the selected return, in this instance **Spring 2017**.

2. Ensure that the **Census Folder** is configured correctly and that the required **Security message for Reports** is specified before creating a **New** return, as described in the following sections.

Configuring the Census Folder

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

IMPORTANT NOTE: Due to the sensitive nature of some of the data stored in SIMS, careful consideration should be given when specifying the location of any folder into which you save sensitive data, e.g. census returns, imported and exported CTFs, etc.

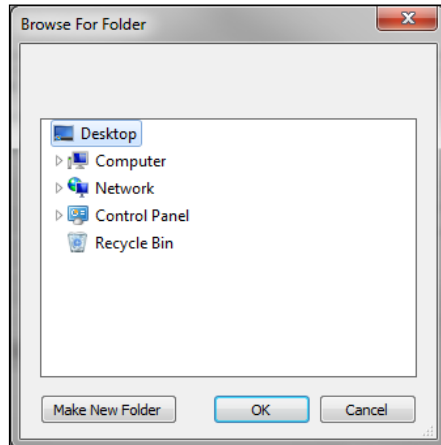
You should be mindful of your school's responsibilities with respect to information security. Consider which users have access to the chosen folder, especially if the folder is shared on a server. Please refer to the DfE website (<https://www.gov.uk/service-manual/technology/securing-your-information>) for securing information guidance. If you are in any doubt, consult with your IT Security Officer before proceeding.

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

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



Browse button



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

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

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

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

Specifying the Security Message for Reports

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

1. The security message text defaults to `This report contains sensitive information`, but can be edited, if required.
2. If any edits are made, you can click the **Default Message** button to revert to the default text.
3. Click the **New** button to display the **Census Return Details** page.

Editing Census Details

The **Census Details** panel displays the following dates (most of which are read-only):

- The census date is displayed as 19/01/2017.
- Attendance data collected from the start of the 2016 Autumn term to 31/12/2016.
- Exclusions data collected from 28/03/2016 to 31/08/2016.
- FSM (Free School Meal) data collected from 07/10/2016 to 19/01/2017.
- Learner Support collected from 01/08/2016 to 19/01/2017.

1 Census Details			
Census Date	19/01/2017		
Description	School Census Spring 2017		
Attendance collected from	01/09/2016	Attendance collected to	31/12/2016
Exclusions collected from	28/03/2016	Exclusions collected to	31/08/2016
FSM collected from	07/10/2016	FSM collected to	19/01/2017
Learner Support collected from	01/08/2016	Learner Support collected to	19/01/2017

1. By default, the return **Description** is displayed as **School Census Spring 2017**. This description can be edited, if required, e.g. to identify a dry run.

WARNING: Each description used must be unique. An error message is displayed if SIMS identifies a duplicate description.

A unique description also helps to identify the required return when viewed in the **Census Return for Spring Term** browser and can be particularly useful when creating dry runs or copies of existing returns.

2. The **Attendance collected from** date defaults to **01/09/2016**. This date can be edited if the start of your school's Autumn term is different.

Specifying the Selected Period on Census Day

The selected period on the census day is used in conjunction with the class information collected in the return. It is based on the last digit of the DfE establishment number and is the period on census day (as defined by the DfE) when your school should run the return.

NOTE: These times move down by one each year, i.e. a school using 'one hour before the end of morning school' last year will use 'one hour after the start of morning school' this year.

For more information about the selected period on census day, please refer to section 5.7 of the *School census 2016 to 2017 Guide* for schools and LAs on the DfE website

(<https://www.gov.uk/government/publications/school-census-2016-to-2017-guide-for-schools-and-las>).

By default, the lowest year on your school's timetable is displayed as the year taught in (YTI) when the timetable classes begin.

1. If the required **Reference Date** is different to that displayed (e.g. because the school is closed on census day), enter an alternative date or select a date from the calendar.
2. Ensure that the lowest year that you want to report as being on the timetable is displayed in the **YTI when timetabled classes begin** field. Select a different YTI from the drop-down list, if required.

Students in curriculum year groups below that displayed are assumed to be taught in non-timetabled classes, i.e. registration groups.

3. Select the **Selected Period** from the **Period Name** drop-down list. This is the period on census day that your school should run the return, as defined by the DfE.
4. If you want to **Include Alternative Curriculum** periods in the **Classes** panel, select the associated check box.
5. Click the **Calculate All Details** button.

Calculating All Details

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

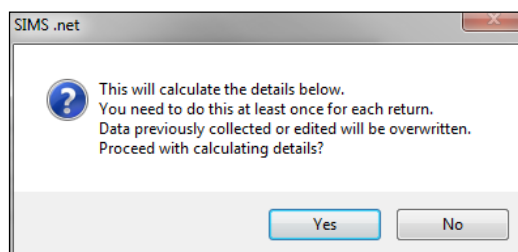
IMPORTANT NOTE: You must calculate all details at least once to populate the various panels for each return.

Do not use the **Calculate All Details** button more than once if you wish to keep any changes you have made. Clicking the **Calculate All Details** button overwrites any previously collected or edited data (in every panel where details are calculated automatically) with the data currently stored in SIMS.

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

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

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



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

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

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

Editing School Information

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

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

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

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

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

Information for Academies:

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

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

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

- The **Previous URN Number** (used by other census returns) and **Date Number Changed**.
3. Click the **Save** button then click the **OK** button to return to the **Census Return Details** page, where the updated details are displayed.


Editing School Childcare Details

School childcare details are collected annually in the School Census Spring return.

Details can be entered via **Focus | School | School Details**, enabling the information to be maintained at any time throughout the year.

The **Childcare** panel (on the **Census Return Details** page) displays read-only childcare provision information that has been entered previously via School Details. Additional information can be added or existing data edited by clicking the **Edit** button. This provides a direct link to the **School Details** page.

If no childcare information is recorded, a validation error is triggered when the return is run.

3 Childcare								
 Edit								
Type	On Site	Signposted	Opening Time	Closing Time	No of Childcare Places	Provider	Other Schools	Weeks Open
Before School Childcare	Yes	No	07:00		40	School	Yes	
After School Childcare	Yes	No		18:00	25	School	No	
Holiday Childcare	Yes	Yes, form...	08:30	16:30	40	Other (non-school) Pr...	Yes	5
Under Fives Childcare	No	No						

03| Producing the School Census Spring Return

1. Click the **Edit** button in the **Childcare** panel to display the **School Details** page.

School Detail

School Details - Green Abbey School

Save Undo Help

1 Establishment 2 Address 3 Contact Details 4 Sites 5 Documents 6 Childcare

1 Establishment

School Name: Green Abbey School

LA: 823 Central Bedfordshire

Establishment Number: 4321

Unique Reference Number:

UK Provider Reference Number:

School Phase: All Through

School Type: Comprehensive all-through 11-18

School Governance: Community

Intake Type: Comprehensive

Previous School Name:

Previous Estab Number:

Previous URN Number:

Boarding Pupils: ☐ Nursery Class ☐

Head Teacher: Mr Adrian Blacker

Main Contact: Mr Adrian Blacker

Date Name Changed:

Date Number Changed:

Date Number Changed:

Special Class or Unit: ☐

OK Cancel

2. Click the **Childcare** hyperlink to display the **Childcare** panel, where the current childcare details are displayed.

Childcare

Type	On Site	Signposted	Opening Time	Closing Time	No of Childcare Places	Provider	Other Schools	Weeks Open	Notes	Open
Before School Childcare	Yes	No	07:00		40	School	Yes		Parent and...	
After School Childcare	Yes	No		18:00	25	School	No			
Holiday Childcare	Yes	Yes, form...	08:30	16:30	40	Other (non-s...	Yes	5		
Under Fives Childcare	No	No								

3. Double-click one of the four existing records to display the **Update Childcare Details** dialog. Alternatively, highlight a record then click the **Open** button.

4. Enter the required details.
 - **Type** - based on the record you have opened, the type of childcare being provided is displayed automatically. The four types of childcare collected for the return are:
 - **Before School Childcare**
 - **After School Childcare**
 - **Holiday Childcare**
 - **Under Fives Childcare.**
 - **On Site** - select the applicable option from the drop-down list:
 - **Yes** - select this option if childcare is being provided on the school premises.
 - **No** - select this option if childcare not is being provided on the school premises.
 - **Signposted** - one of the following options must always be selected from the drop-down list:
 - **Yes, formal arrangements including transport** - select this option if your school has formal arrangements with another provider that provides childcare for your students, including transport to their site.
 - **Yes, list of providers that pick up from school** - select this option if a list of local providers that will pick up students from the school to help parents is provided.
 - **No**
 - **Not Known.**

- **Opening Time** - enter the time that the service becomes available (not applicable to after school care).

NOTE: Ensure that the time is entered in 24 hour format. A colon should be entered between the hours and the minutes, e.g. 07:00.

- **Closing Time** - enter the time that the service closed (not applicable to before school care).

NOTE: Ensure that the time is entered in 24 hour format. A colon should be entered between the hours and the minutes, e.g. 17:30.

- **Number of Childcare Places** - enter the maximum number of childcare places that the service can provide.
 - **Provider** - select the description from the drop-down list that most accurately describes the provider of the service:
 - **School**
 - **School in Partnership** (with another provider)
 - **Other (non-school) Provider.**
 - **Other Schools** - is the service made available to children from other schools? Select as applicable from the drop-down list:
 - **Yes**
 - **No**
 - **Unknown.**
 - **Weeks Open** - enter the number of weeks for which childcare is provided (applicable to holiday and under-fives childcare only).
 - **Notes** - notes can be added and then edited later, if required.
5. Click the **OK** button to return to the **School Details** page.
 6. Click the **Save** button and then the **OK** button to return to the **Census Return Details** page.

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.

The **Top-up Funding** panel enables you to record the on-roll students for whom your school is receiving top-up funding on census day.

If the students with top-up funding have been recorded previously via **Tools | Statutory Return Tools | Update Top-Up Funding**, the data is displayed in the **Top-up Funding** panel.

Surname	Preferred Surname	Forename	YTI	Reg	SEN	Ever in
Aaron	Aaron	Chris	6	6KH		No
Davies	Davies	Ben	4	4ES		No
Dexter	Dexter	Bethany	3	3CB		No

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

1. Click the **Edit** button to display the **Update Students with Top-up Funding** dialog. The students currently recorded as having top-up funding are displayed in the **Top-up Funding** section.

Update Students with Top-up Funding

Update

Term: Spring 2017 Students On-Roll on Census Day

Surname: Forename: YTI: All Reg: All

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

Top-up Funding

Surname	Preferred Surname	Forename	YTI	Reg	SEN	Ever in Care
▶ Aaron	Aaron	Chris	6	6KH		No
Davies	Davies	Ben	4	4ES		No
Dexter	Dexter	Bethany	3	3CB		No

03| Producing the School Census Spring Return

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

Term: Spring 2017 Students On-Roll on Census Day

Surname: Forename: YTI: All Reg: All

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

Surname	Preferred Surname	Forename	YTI	Reg	SEN	Ever in Care
White	White	Aurora	4	4SL		No
Whitehead	Whitehead	William	R	ELM		No
Whitemore	Whitemore	Amie	2	2JB		No

Top-up Funding ➕ Add ✖ Remove

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

Term: Spring 2017 Students On-Roll on Census Day

Surname: Forename: YTI: All Reg: All

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

Surname	Preferred Surname	Forename	YTI	Reg	SEN	Ever in Care
Whitehead	Whitehead	William	R	ELM		No

Top-up Funding ➕ Add ✖ Remove

Surname	Preferred Surname	Forename	YTI	Reg	SEN	Ever in Care
Aaron	Aaron	Chris	6	6KH		No
Davies	Davies	Ben	4	4ES		No
Dexter	Dexter	Bethany	3	3CB		No
White	White	Aurora	4	4SL		No
Whitemore	Whitemore	Amie	2	2JB		No

4. 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.
5. Click the **Update** button to save the data and arrange the list of students in **Surname** order.
6. Click the **OK** button (located at the bottom right-hand side of the screen) to return to the **Census Return Details** page, where the updated information is displayed in the **Top-up Funding** panel.



Additional Resources:

Preparing for the School Census Spring 2017 Return handbook



More Information:

Top-up Funding Report on page 41

Editing Students Post Looked After Arrangements

The Post Looked After Arrangements routine provides schools with the ability to record whether students who are on-roll on census day were looked after immediately before adoption or prior to being the subject of a residence or special guardianship order.

If the students with post looked after arrangements (PLAA) have been recorded previously via **Tools | Statutory Return Tools | Update Student Post Looked After Arrangements**, the data is displayed in the **Post Looked After Arrangements** panel.

1. Click the **Recalculate** button (in the **Post Looked After Arrangements** panel) to ensure that all students who already have a PLAA status are displayed.

Surname	Preferred Surname	Forename	YTI	Reg	Ever in C.	Post Looked After Arrangements
De Souza	De Souza	Luciano	12		Yes	Ceased to be looked after through Adoption
Noble	Noble	Natasha	12		No	Ceased to be looked after through a Special Guardianship Order (SGO)

The information displayed in the **Post Looked After Arrangements** panel is read-only. Updating the information, e.g. editing the PLAA status or adding a student, must be done via the **Edit** button.

- Click the **Edit** button to display the **Update Students Post Looked After Arrangements** page. Any students currently recorded as having PLAA are displayed in the second panel.

Update Students Post Looked After Arrangements

Update Links Help Close

Term: Spring 2017 Students On-Roll on Census Day

Surname: Forename: YTI: All

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

Surname	Preferred Surname	Forename	YTI	Reg	Ever in Care	Post Looked After Arrangements	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"/>

Post Looked After Arrangements Add Remove

- Click the **Search** button to display a list of all students who have not been defined as having PLAA.

Alternatively, enter all or part of the required search criteria then click the **Search** button.

Term: Spring 2017 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

4. Highlight the students who you want to record as having PLAA then click the **Add** button to move the selected students to the second panel.

One or more students can be selected using **Ctrl**+click or **Shift**+click functionality.

Surname	Preferred Surname	Forename	YTI	Reg	Ever in Care	Post Looked After Arrangements	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"/>

5. For each student added to the second panel, select the post looked after arrangement status by clicking in the applicable cell in the **Post Looked After Arrangements** column then selecting the required 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).**

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

You do not need to change any existing residence orders but new post looked after arrangements must be recorded as child arrangement orders.

6. 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 proof of DfE/Ofsted compliance.

7. To remove a name from the list, highlight it then click the **Remove** button. The record is displayed in the first panel, from where it can be reselected, if required.
8. Click the **Update** button to save the information and arrange the list of students in surname order.

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

9. Click the **OK** button (located at the bottom right-hand side of the screen) to return to the **Census Return Details** page, where the updated information is displayed in the **Post Looked After Arrangements** panel.



Additional Resources:

Preparing for the School Census Spring 2017 Return handbook



More Information:

Post Looked After Arrangements Report on page 41

Editing Class Information

When the School Census is generated, the class information displayed is a 'snapshot' of SIMS data as of the selected period on census day. The selected period is based on the last digit of your DfE establishment number (please see *Specifying the Selected Period on Census Day* on page 14).

NOTE: If the school is closed on census day, the information displayed is still based on classes as at census day.

If the **Include Alternative Curriculum** check box is selected (in the **Selected Period on Census Day** panel), Alternative Curriculum periods are included in the list of class names displayed in the **Classes** panel.

The **Classes** panel consists of two sections, the **Reg Classes** (registration classes) panel and the **TT Classes** (timetabled classes) panel.



More Information:

Class Report on page 41

Editing Timetabled Classes

The timetabled classes previously set up in Nova/Academic Management are displayed in the read-only **Class Name** column. The **Total** numbers of students and staff are calculated automatically and displayed at the bottom of the panel.

Z Classes						
TT Classes						
Class Name	Students(On Roll)	Students(Guest)	Teachers	Support Staff	YTI	
10x/Bi1	28	0	1	0	Year 10	
10x/Sc2	27	0	1	0	Year 10	
10x/Sc3	26	0	1	0	Year 10	
10y/En1	27	0	1	0	Year 10	
10y/En2	27	0	1	0	Year 10	
10y/En3	26	0	1	0	Year 10	
Total	888	0	38	1		

Check and, if necessary, edit the following information.

- **Students (On Roll)**

The number of students in the timetabled class at the selected period is displayed. The entries in this column can be edited if required. Ensure that:

- any students temporarily absent on the census day are included.
- any part-time students not scheduled to be in school at the selected period are excluded. These students should be counted in the **Student Reconciliation** panel instead (please see *Editing Student Reconciliation* on page 28).

- **Students (Guest)**
This column displays any guest students who are normally in the timetabled class at the selected period. Ensure that any guest students have an **Enrolment Status** of **Guest student** in the **Student Details** panel (**Focus | Students | Student Details**).
- **Teachers**
Include all qualified and unqualified teachers taking the timetabled class at the selected period.
Exclude teachers who are:
 - wholly or mainly providing support to individual students.
 - on Planning, Preparation and Assessment (PPA) time.
- **Support Staff**
Include teaching assistants, special needs support staff, support staff for minority ethnic students and other education support staff in the timetabled class at the selected period.
Exclude non-teaching staff wholly or mainly providing support to individual students.
- **Year Taught In**
This column shows the curriculum year group of each class displayed. To edit the year group, click in the cell and select from the drop-down list.
Select **Mixed Year** if a timetabled class contains students from more than one National Curriculum year.

NOTE: This does not include classes containing any students who have been held back, or advanced a year and are of a different chronological age to the rest of the class.

Type, Key Stage and Activity (applicable to schools that have timetabled classes for Years Taught In under 7)

These three columns are displayed only if your school has timetabled classes for Years Taught In under 7. If applicable, enter the required values.

Recalculating the Classes Information

The data in the **Classes** panel can be replaced with the original data from the database by clicking the appropriate **Recalculate** button.

IMPORTANT NOTE: Clicking the **Recalculate** button overwrites any edited data with the original data stored in SIMS. Do not use the **Recalculate** button if you wish to keep any changes you have made.

Adding Classes

It may be necessary to add an additional class if, for example, some students are receiving additional teaching support. This is achieved by clicking the **New** button then entering the applicable class information in the additional row, which is displayed at the bottom of the table.

NOTE: Remember to reduce the number of students in the main class.

Ensure that you click the **Save** button to save the data and refresh the display.

Deleting Classes

In some circumstances, classes may need to be deleted, e.g. if they do not normally take place at the selected period. This is achieved by highlighting the class then clicking the **Delete** button.

NOTE: If you delete a class that contains students, you must recalculate again to ensure that student numbers are correct.

Editing Student Reconciliation

The **Student Reconciliation** panel is used to reconcile the various categories of students with the numbers in the **Classes** panel. The number of on-roll students who are not in class at the selected period, because they are attending another school, part-time, etc. should be entered in the appropriate fields.

8 Student Reconciliation				
On roll students in classes	<input type="text" value="924"/>		Total students	<input type="text" value="924"/>
Part-time students not at school	<input type="text" value="0"/>	Students on work experience	<input type="text" value="0"/>	Must agree with
Private study students	<input type="text" value="0"/>	Students at FE colleges	<input type="text" value="0"/>	Students on roll
Students at another school	<input type="text" value="0"/>			<input type="text" value="1016"/>

For example:

In the previous example there are 1016 **Students On Roll** but only 924 **On Roll students in classes**. The difference must be accounted for. This could be the number of students who are attending another school at the selected period. In which case, **92** should be entered in the **Students at another school** field.

1. If applicable, enter the number of **Part-time students not at school**, the number of **Private study students** and the number of **Students at another school**.
2. If applicable, enter the number of **Students on work experience** and the number of **Students at FE colleges**.
3. Check the values in the **Total students** and **Students On Roll** fields. The two values must be the same.

The value in the **Total students** field is calculated automatically and equals the sum of the following:

- **On Roll Students in classes**
 - **Part-time students not at school**
 - **Private study students**
 - **Students at another school**
 - **Students on work experience**
 - **Students at FE colleges.**
4. Amend the values in the editable fields, if necessary.

Entering Attendance Information

Termly 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 31/08/2016, who were on-roll for at least one session during the collection period from the start of the Autumn term to 31/12/2016.

Initially the **Attendance** panel is blank. However, after clicking the **Calculate All Details** button (located in the **School Information** panel) the display changes.

IMPORTANT NOTE: Clicking the **Calculate All Details** button overwrites any edited data, in every panel, with the original data stored in SIMS. Do not use this button if you wish to keep any changes you have made.

The information displayed in the **Attendance** panel (after the **Calculate All Details** button is clicked) is dependent on which of the following is applicable:

- SIMS Attendance/Lesson Monitor is in use, the attendance codes being used are DfE compliant and there are either:
 - no missing marks
 - or
 - missing marks.
- SIMS Attendance/Lesson Monitor is in use and the attendance codes being used are DfE non-compliant.
- SIMS Attendance/Lesson Monitor is not in use.



More Information:

Attendance Report on page 39

SIMS Attendance/Lesson Monitor Users

If SIMS Attendance/Lesson Monitor is in use, ensure that all missing marks and unexplained absences for the previous term have been dealt with before commencing the return.

TIP: After the Create and Validate process is run, the Attendance detail report can be used to assist with the checking of attendance data. Select **Attendance Report** from the **Detail Report** drop-down list.

Are your Attendance Codes DfE Compliant?

If Attendance/Lesson Monitor is in use and your school is using DfE compliant attendance codes, attendance data is entered directly into the return, providing that there are no missing marks.

If all attendance marks have been entered in Attendance/Lesson Monitor, the following message is displayed in the **Attendance** panel, informing you that your attendance codes are DfE compliant but will be rechecked at the Create and Validate stage.

5 Attendance

Your attendance codes are DfE compliant
This will be rechecked at the Create & Validate stage

However, if any missing attendance marks are detected, the following message is displayed in the **Attendance** panel, requesting that you add the missing attendance marks.

5 Attendance

Some attendance marks are missing
Go to Focus | Attendance | Deal with Missing Marks
Please add attendance marks and then click 'Recalculate'

1. Use the Deal with Missing Marks routine (**Focus | Attendance (or Lesson Monitor) | Deal with Missing Marks**) to locate the missing marks and enter appropriate attendance codes.
2. Return to the **Census Return Details** page and click the **Check missing marks** button in the **Attendance** panel to ensure that all missing marks have been dealt with.

NOTE: The Create and Validate process can still be run even if some attendance marks are missing. You will be asked if you wish to continue to create the return or cancel the Create and Validate process.



More Information:

Producing Detail Reports on page 38

Are your Attendance Codes DfE Non-Compliant?

If Attendance/Lesson Monitor is in use but one or more invalid attendance codes have been detected, e.g. the **F**, **Z** or **@** code is in use, a message is displayed in the **Attendance** panel to inform you that your attendance codes are not DfE compliant.

5 Attendance

Your attendance codes are not DfE compliant
Please deal with this lack of compliance and then press 'Check attendance codes'

1. Non-compliant codes must be dealt with. Please contact your Local Support Unit for assistance.
2. Click the **Check attendance codes** button to check that DfE attendance codes are now in use.

If the attendance codes are now DfE compliant, a message informs you that the codes will be rechecked at the **Create & Validate** stage.

3. Click the **OK** button to continue.

SIMS Attendance/Lesson Monitor Not in Use

If Attendance/Lesson Monitor is not in use, the following data must be entered manually:

- Termly Possible Sessions (**T Poss Sessions**)
- Termly Sessions Missed due to Authorised Absence (**T Auth Absences**)
- Termly Sessions Missed due to Unauthorised Absence (**T Unauth Absences**).

Attendance

Attendance Application not in use. Manual entry is required.

Group By: [v] Attendance Collection Period (01/09/2016-31/12/2016)

Check for additional student & zero totals

Surname	Forename	Year Taught In	Reg Group	Enrol Status	T Poss Sessions	T Auth Absences	T Unauth Absences
Alexanders	Bertina			On Roll	0	0	0
Babe	Bud			On Roll	0	0	0
Bedeau	Sebastiana			On Roll	0	0	0
Benard	Junius			On Roll	0	0	0
Bourdage	June			On Roll	0	0	0
Calzone	Merlin			On Roll	0	0	0
Catapano	Charity			On Roll	0	0	0
Damrell	Glen			On Roll	0	0	0
Doberer	Hilbert			On Roll	0	0	0
Dusel	Ambrogio			On Roll	0	0	0
Frymark	Garnett			On Roll	0	0	0
Garcia	Sally			On Roll	0	0	0
Gasky	Silvano			On Roll	0	0	0
Gaumont	Allegria			On Roll	0	0	0

1. To filter the display of students in the **Attendance** panel, select **Year Group**, **Registration Group** or **Enrolment Status** from the **Group By** drop-down list.
Alternatively, select **Group by None** to display a list of all students.
2. To sort the displayed data by surname, forename, year group, registration group or enrolment status, click the appropriate column header.
3. For each student, enter the correct attendance numbers in the **T Poss Sessions**, **T Auth Absences** and **T Unauth Absences** columns.
4. To clear the attendance information and check for additional students, click the **Check for additional students & zero totals** button.

WARNING: If the **Check for additional students & zero totals** button is clicked, any attendance data entered manually is lost.

Entering General Information

The **General** panel deals with the number of students who receive Free School Meals on census day.

12 General	
Number of free school meals taken on census day <input type="text" value="0"/>	FSM taken excludes the infant pupil universal entitlement (except for pupils in R.1,2 who are eligible for FSM)

Enter the **Number of free school meals taken on census day** by students, in any year, who are eligible for Free School Meals.

- Students should be included only if they meet the Free School Meals eligibility criteria (i.e. in respect to family income).
- If your school has students of a young age, do not include students taking school meals in Reception, Year 1 and Year 2, if they are not eligible for Free School Meals in respect to family income, e.g. they are receiving a Universal Infant School Meal only.



More Information:

General Report on page 41

Entering Secondary Admissions Appeals Totals

Applicable to Secondary, Middle deemed Secondary and All-Through schools. Schools that were Academies, Voluntary Aided schools or Foundation schools at the time that the appeals were lodged, should also complete this panel.

The **Secondary Admissions Appeals** panel deals with appeals lodged before 01/09/2016 against refusals to admit a student for a place at your school at the start of the 2016/2017 academic year.

All fields in this panel are editable and must be populated manually.

11 Secondary Admissions Appeals	
Foundation Schools/Voluntary Aided Schools/Academies must complete this section (this does not include AP Academies, AP Free Schools, Academy Special Schools)	
Lodged <input type="text" value="0"/>	Independent Admissions Committee
Withdrawn <input type="text" value="0"/>	Heard <input type="text" value="0"/>
	Upheld <input type="text" value="0"/>
	Rejected <input type="text" value="0"/>

- Enter the total number of admissions appeals that have been **Lodged** and the total that have been **Withdrawn** before 01/09/2016 against a refusal to admit a child to the school for a place at the start of the 2016/2017 academic year. Information about appeals lodged on or after 01/09/2016 is not required. Enter information related to entry to the school at the start of the academic year only.
- Enter the total number of admissions appeals **Heard**, **Upheld** and **Rejected** by the **Independent Admission Committee**.

When this panel is complete and you are satisfied that all the details on the **Census Return Details** page are correct, the census return file can be created and validated (please see *Creating and Validating a School Census Return* on page 33).

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Creating and Validating a School Census Return

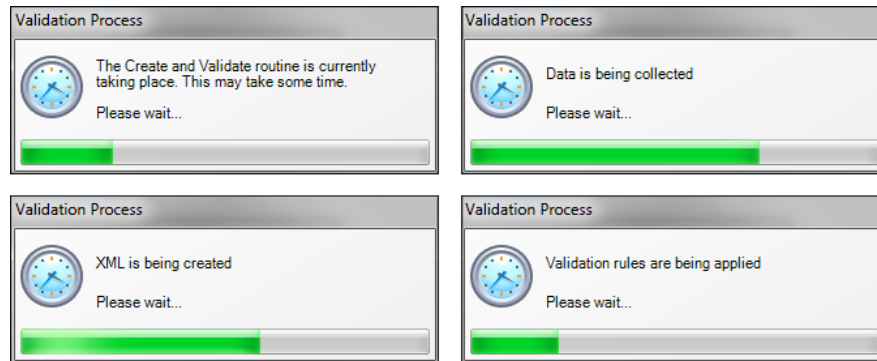
A return must be created, validated and authorised before it can be sent to your Local Authority or uploaded to the DfE COLLECT data collection website (as applicable to your school).

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

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

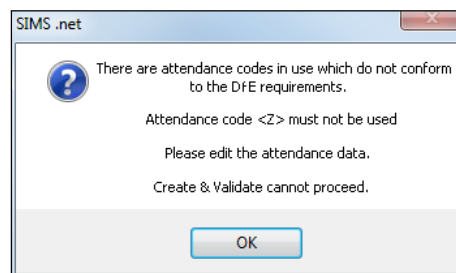
1. Select **Routines | Statutory Returns | School Census** to display the **Census Return** browser.
2. Click the **Search** button to display a list of returns.
3. Double-click the required return to display the **Census Return Details** page.
4. Click the **Create & Validate** button to begin the process.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

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



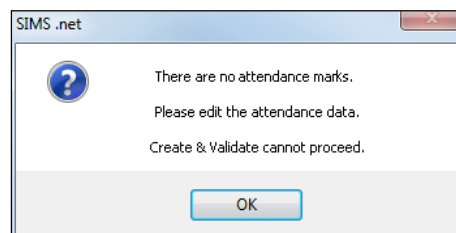
If there is an irregularity in the attendance marks, one of the following messages is displayed:

- If the attendance codes are not DfE compliant, a message similar to the following is displayed informing you which code(s) must not be used.



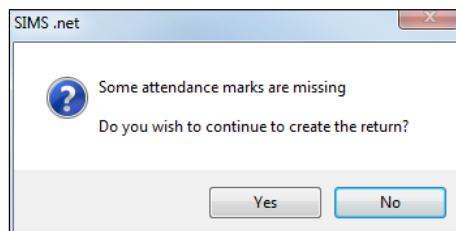
The lack of compliance must be dealt with before the Create and Validate process can be performed. Please contact your Local Support Unit for assistance.

- If no attendance marks are found and SIMS Attendance is in use, the following message is displayed informing you that the Create and Validate process cannot proceed.



Click the **OK** button then edit the attendance data before attempting to create and validate the return again.

- If there are any missing attendance marks, the following message is displayed enquiring as to whether you wish to continue with the Create and Validate process.



Click the **Yes** button to continue creating and validating the data.

Alternatively, click the **No** button to cancel the process, then use the Deal with Missing Marks routine (**Focus | Attendance** (or **Lesson Monitor**) | **Deal with Missing Marks**) to locate the missing marks and enter appropriate attendance codes. For more information, please refer to the *Managing Pupil/Students Attendance* or *Monitoring Session and Lesson Attendance* handbook, as applicable.

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

Resolving Validation Errors and Checking Queries

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

Validation Errors Summary			
Return Validated - 10		Validation rules failed (Errors - 4; Queries - 6)	
Student Search		Enter Student Name, DOB (YYYY-MM-DD) or UPN for student filter	
Error Search	ALL	Total of displayed rows: 10	To resolve an error, click in row to navigate to the relevant screen
Type	Sequence	Message	Location
F	1500	UPN missing	Name: Abraham, Janel Date of Birth: 2005-05-19, Female/UPN
F	1500	UPN missing	Name: Reid, Rosal Date of Birth: 2009-03-07, Female/UPN
F	1940	Pupils aged 5 and over Language missing or invalid	Name: Henderson, Jacki Date of Birth: 2010-05-07, Male/UPN: K823299914029
F	2360	Insufficient Address information provided	Name: Bains, Kiril Date of Birth: 2005-01-18, Male/UPN: M820200109012
Q	1601Q	Please Check: Pupil's age is out of range for school type	Name: Sungail, Skaisel Date of Birth: 2003-03-28, Female, Age: 12/UPN: B820200106088
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
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
Q	2355Q	Please check: Pupil record with no address details	Name: Baliraki, Cyhal Date of Birth: 2010-03-14, Female/UPN: C823299914005
Q	2520Q	Please check: sessions possible should not be greater than 150	Name: Aaron, Liz Date of Birth: 2005-09-01, Female/UPN: J820200109032
Q	2520Q	Please check: sessions possible should not be greater than 150	Name: Aaron, Sophie Date of Birth: 2005-09-01, Female/UPN: M820200109034

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

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

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

To assist in the resolution of any errors and queries:

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

Type	Sequence	Message	Location	Solution
F	1500	UPN missing	Name: Abraham, Janel Date of Birth: 2005-05-18, Female/UPN: 1820200107007	# 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: 1820200106006	# Go to Focus Student Student Details and add or issue a UPN
F	1504	Pupils aged 5 and over Language missing or invalid	Name: Henderson, Jacki Date of Birth: 2010-05-07, Male/UPN: 1820200106009	# 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: 1820200106012	# 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: Sungai, Skasael Date of Birth: 2003-03-28, Female, Age: 12/UPN: 1820200106008	# 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.

- 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: Smith, Alex Date of Birth: 2005-05-12, Male/UPN: 1820200107007	# Go to Focus Student Student Details and add or issue a UPN
F	1500	UPN missing	Name: Smith, Amy Date of Birth: 2006-03-02, Female/UPN: 1820200106006	# Go to Focus Student Student Details and add or issue a UPN
F	1504	Pupils aged 5 and over Language missing or invalid	Name: Henderson, Jacki Date of Birth: 2010-05-07, Male/UPN: 1820200106009	# 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: 1820200106012	# 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: Sungai, Skasael Date of Birth: 2003-03-28, Female, Age: 12/UPN: 1820200106008	# Go to Focus Student Student Details and enter pupil's date of birth

- 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.

Report			
Validation Errors Summary			
Return Validated: 10 Validation rules failed (Errors - 4, Queries - 6)			
Student Search: UPN: Name: Abraham, Jane Date of Birth: 2005-05-19, Female			
Error Search: ALL Total displayed rows: 2 To resolve an error, click in row to navigate to the relevant screen			
Type	Sequence	Message	Solution
F	1500	UPN missing	Name: Abraham, Jane Date of Birth: 2005-05-19, FemaleUPN:
Q	2500Q	Please check: sessions possible should not be greater than 150	Name: Abraham, Jane Date of Birth: 2005-05-19, FemaleUPN:

- 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.

Report			
Validation Errors Summary			
Return Validated: 10 Validation rules failed (Errors - 4, Queries - 6)			
Student Search: UPN: Name: Abraham, Jane Date of Birth: 2005-05-19, Female			
Error Search: QUERIES Total displayed rows: 6 To resolve an error, click in row to navigate to the relevant screen			
Type	Sequence	Message	Solution
Q	1601Q	check: Pupil's age is out of range for school type.	Name: Sungai, Skaseel Date of Birth: 2003-03-28, Female, Age: 12UPN: B820200106088
Q	1602Q	check: duplicate pupil records with the same Surname, Forename, Gender and Date of birth.	Name: Beninson, Hugo Date of Birth: 2010-02-03, MaleUPN:
Q	1601Q	check: duplicate pupil records with the same Surname, Forename, Gender and Date of birth.	Name: Beninson, Hugo Date of Birth: 2010-02-03, MaleUPN: V823299914008
Q	2300Q	check: Pupil record with no address details.	Name: Balinski, Cyril Date of Birth: 2010-03-14, FemaleUPN: C823299914005
Q	2500Q	check: sessions possible should not be greater than 150	Name: Aaron, Liat Date of Birth: 2005-09-01, FemaleUPN: J820200109032
Q	2500Q	Please check: sessions possible should not be greater than 150	Name: Aaron, Sophie Date of Birth: 2005-09-01, FemaleUPN: M820200109034

- 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.

Report			
Validation Errors Summary			
Return Validated: 10 Validation rules failed (Errors - 4, Queries - 6)			
Student Search: UPN: Name: Abraham, Jane Date of Birth: 2005-05-19, Female			
Error Search: ALL Total displayed rows: 10 To resolve an error, click in row to navigate to the relevant screen			
Type	Sequence	Message	Solution
F	1500	UPN missing	Name: Abraham, Jane Date of Birth: 2005-05-19, FemaleUPN:
F	1500	UPN missing	Name: Reid, Rosal Date of Birth: 2009-03-07, FemaleUPN:
F	1540	and 5 and over Language missing or invalid.	Name: Henderson, Jacki Date of Birth: 2010-05-07, MaleUPN: K823299914029
F	2300	Address information provided.	Name: Bierre, Kirki Date of Birth: 2005-01-18, MaleUPN: H820200109012
Q	1601Q	check: Pupil's age is out of range for school type.	Name: Sungai, Skaseel Date of Birth: 2003-03-28, Female, Age: 12UPN: B820200106088
Q	1602Q	check: duplicate pupil records with the same Surname, Forename, Gender and Date of birth.	Name: Beninson, Hugo Date of Birth: 2010-02-03, MaleUPN:
Q	1601Q	check: duplicate pupil records with the same Surname, Forename, Gender and Date of birth.	Name: Beninson, Hugo Date of Birth: 2010-02-03, MaleUPN: V823299914008

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

- View a summary of validation failures, which is particularly useful if there are a large number of errors/queries, by clicking the **Report** button (located on the left-hand side and directly above the **Validation Errors Summary** panel). The report is displayed in your web browser, e.g. Windows® Internet Explorer®, from where it can be printed, or transferred to another application, if required (please see *Transferring Report Data to a Spreadsheet* on page 44).

The report (Validation Errors Summary.HTML) is saved automatically in the **Census Folder**, which was specified previously in the **Census Return for <season> <year> Term** browser. The original report, which was generated when the **Create & Validate** button was clicked (e.g. <LA Code><School Number>_<Survey Type>_<LA Code><LL><Year>_<Serial Number>_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.



More Information:

Transferring Report Data to a Spreadsheet on page 44

Producing Detail Reports

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

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

Also included in the report header is the **School Name**, the **Fileset Number**, the **Filename**, the **Report Created** date, and the **XML Version**.

The following reports are currently available:

On-Roll Basic Details Report

Report Criteria: Students on-roll on census day.

This report provides basic information about the students, e.g. UPN, ULN, legal surname, legal forename, preferred surname, former surname, date of birth (DOB), gender, year taught in (YTI), date of admission (DOA), enrolment status, ethnicity, language, Proficiency in English, nationality, country of birth, Youth Support Services Agreement indicator (YSSA), part-time status and boarder status.

Leavers Basic Details Report

Report Criteria: Students not on-roll on census day:

- Leavers with attendance one term ago (from the start of the 2016 Autumn term to 31/12/2016) and/or
- Leavers with exclusions two terms ago (28/03/2016 to 31/08/2016) and/or
- Leavers with learner support of Vulnerable Group Bursary Awarded or Discretionary Bursary Awarded from 01/08/2016 to 19/01/2017.

This report provides basic information about leavers, e.g. UPN, ULN, former UPN, legal surname, legal forename, middle names, former surname, date of birth (DOB), gender, date of admission (DOA), date of leaving (DOL), ethnicity, language, nationality, country of birth, part-time status, boarder status, attendance, exclusions and learner support status.

Exclusions Report

Report Criteria: On-roll students and leavers with exclusions two terms ago (23/03/2016 to 31/08/2016). Not applicable to students who have exclusions with appeal result of **Reinstated** or **Not in the best interests of the child**.

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

Attendance Report

Report Criteria: Students with attendance one term ago (from the start of the 2016 Autumn term to 31/12/2016). On-roll and leavers (but not boarders) who were aged four to 15 at 31/08/2016.

This report displays the following information about students and their attendance: UPN, legal surname, legal forename, date-of-birth (DOB), gender, year taught in (YTI), termly sessions possible, termly absence sessions, on-roll status, termly attendance codes (divided into authorised and unauthorised sessions) and attendance not required (Y). Column totals are displayed at the bottom of the columns.

A list of codes and their descriptions are displayed at the end of the report.

Absentees Report

Report Criteria: Students who have missed 14 sessions and whose absence might need to be tracked. On-roll students and leavers (not boarders) with attendance one term ago (from the start of the 2016 Autumn term to 31/12/2016) who were aged four to 15 at 31/08/2016.

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

The report also provides the following basic details about the students who match the report criteria: UPN, legal surname, legal forename, date of birth (DOB), gender, year taught in (YTI), on-roll status and enrolment status.

SEN Report

Report Criteria: On-roll student with SEN Provision/Status = **S** (Statement), **E** (Education), Health and Care Plan, **K** (SEN Support). SEN Need Types ranked 1 and 2 for students with EHCP, Statement or SEN Support.

*NOTE: **A** and **P** are invalid for this return.*

This report provides a list of students who have special educational needs. Displayed are their UPN, legal surname, legal forename, date of birth (DOB), gender, year taught in (YTI), SEN Provision, SEN type ranking, SEN type, member of SEN unit, member of resourced provision indicator and on-roll status.

Address Details Report

Report Criteria: Students on-roll on census day.

This report provides a list of students, their UPN, former UPN (if applicable), legal surname, legal forename, middle name(s), post code, unique property reference number (UPRN), address details and the administrative area/county.

Definition:

Unique Property Reference Number (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.

Free School Meal Eligibility Report

Report Criteria: On-roll students on census day who were eligible for free school meals on or after 07/10/2016 and up to and including census day.

This report provides information on free school meal eligibility for students who match the report criteria: UPN, legal surname, legal forename, date of birth (DOB), gender, year taught in (YTI), on-roll status and free school meal eligibility start date, end date and the UK country in which the eligibility applies.

NOTES: This report includes any free school meals recorded outside of England, e.g. Wales.

Only Free School Meals records where the country recorded is England or <blank> attract the Pupil Premium.

Learner Support Report

Report Criteria: On-roll students and leavers aged 16 plus at 31/08/2016 who have been awarded Vulnerable Group and/or Discretionary Bursary funding from 01/08/2016 to 19/01/2017.

This report provides information about the applicable students: UPN, legal surname, legal forename, date of birth (DOB), gender, year taught in (YTI), Learner Support and on-roll status.

Class Report

Report Criteria: Classes on the selected period on the reference date.

This report provides class information: class name, number of students in class (on-roll and guests), number of staff (teachers and support staff) and the year taught in (YTI).

Displayed at the bottom of this report is the student reconciliation data:

- part-time students not at school
- private study students
- students at another school
- students on work experience
- students at Further Education colleges
- total students not in class at selected period.

Top-up Funding Report

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

The report provides the following information: UPN, legal surname, legal forename, date of birth (DOB), gender, year taught in (YTI) and SEN provision.

Post Looked After Arrangements Report

Report Criteria: On-roll students who have post looked after arrangements as at census day.

The report provides the following information about students who have post looked after arrangements: UPN, legal surname, legal forename, date of birth (DOB), gender, year taught in (YTI) and post looked after arrangements, e.g. ceased to be looked after through a special guardianship order (SGO).

General Report

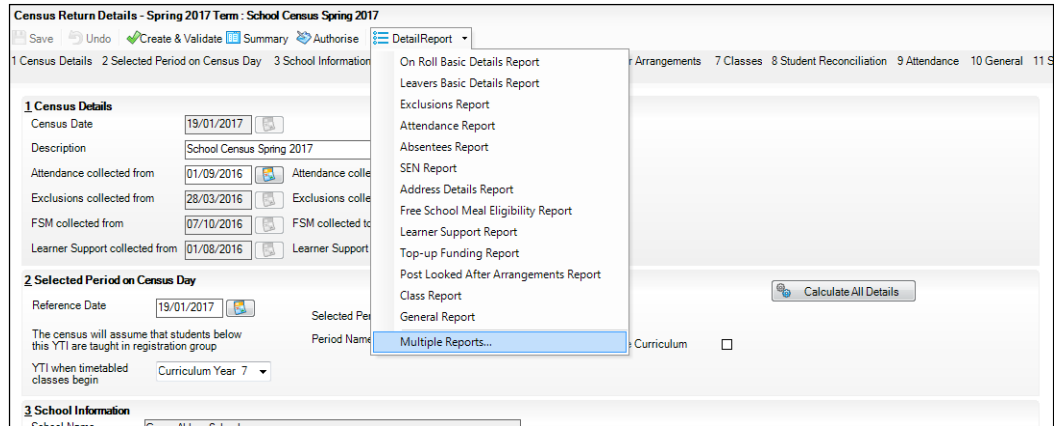
Where applicable, the General report provides information about:

- free school meals taken on census day.
- all appeals that were made in the academic year 2015/2016 against a refusal to admit a student into the school for the 2016/2017 academic year.
- childcare provisions during the 2016/2017 academic year. The report displays the following information: childcare type, on site, signposted, opening time, closing time, number of childcare places, provider, other schools and weeks open.

Generating Detail Reports

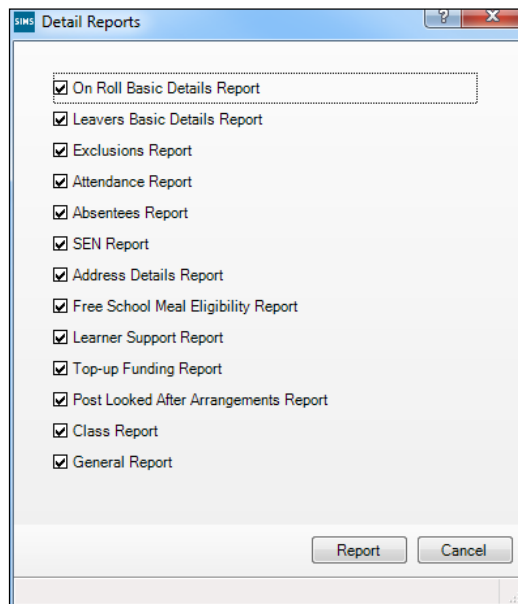
Selecting a Single Detail Report

Select the required report from the **Detail Report** drop-down list located at the top of the **Census Return Details** page. The selected report is generated automatically.



Selecting Multiple Detail Reports

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



2. If any reports are not required, deselect the associated check box.
3. Click the **Report** button to generate the selected reports.

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

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

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

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

For example:

8234321_SC1_823LL17_001_onroll1_basic_details_report.html.

Example of an On Roll Basic Details report:

School Census Spring - 2017 (On Roll Basic Data)																		
Security Message : This report contains sensitive information.																		
Report Criteria: Students on roll on Census day (19/01/2017)																		
Total Students: 997																		
School Name: Green Abbey School Fileset Number: 500 (SIMS net)																		
Filename: 8234321_SC1_823LL17_001.UNA Report Created: 16/08/2016																		
XML Version: Validation 2016.1.0 - Released: 2015-11-17 ErrorList 2016.1.0 - Released: 2015-11-17 Summary 2016.1.0 - Released: 2015-11-17																		
UPN	ULN	Legal Surname	Legal Forename	Preferred Surname	Former Surname	DOB	Gender	YTI	DOA	Enrolment Status	Ethnicity	Language	Proficiency in English	Nationality	Country of Birth	YSSA	Part-time Status	Boarder
8823432113104	1111176938	Abbess	Graham	Abbess	-	28/09/2002	Male	9	03/09/2014	Single Registration	White - English	English	-	-	-	Obtained	No	Not a Boarder
8823432110001	1111171873	Abbey	Gianetta	Abbey	-	24/07/2000	Female	12	01/08/2011	Single Registration	White - English	English	-	United Kingdom	-	Refused	No	Not a Boarder
8823432113105	1111176511	Abbey	Sean	Abbey	-	16/06/2002	Male	9	03/09/2014	Single Registration	White - English	English	-	United Kingdom	-	Obtained	No	Not a Boarder
8823432111904	1111173625	Abbot	Andrew	Abbot	-	13/12/2000	Male	11	03/09/2012	Single Registration	White - Scottish	English	-	United Kingdom	-	Refused	No	Not a Boarder
8823432111005	1111173817	Able	Cameron	Able	-	10/12/2000	Male	11	03/09/2012	Single Registration	White - Irish	English	-	United Kingdom	-	Refused	No	Not a Boarder
8823432111009	1111173609	Ackington	Robert	Ackington	-	26/12/2000	Male	11	03/09/2012	Single Registration	White - English	English	-	-	-	Refused	No	Not a Boarder



More Information:

Configuring the Census Folder on page 12

Transferring Report Data to a Spreadsheet on page 44

Printing a Report from your Web Browser

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

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

Transferring Report Data to a Spreadsheet

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

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

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

Deleting Temporary Web Browser Files

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

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

Deleting the cache in Windows Internet Explorer 10

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

All temporary files (including any Statutory Returns reports files) that the browser has cached are deleted.

5. Click the **OK** button.

Deleting the cache in Windows Internet Explorer 8 and 9

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

All temporary files (including any Statutory Returns reports files) that the browser has cached are deleted.

6. Click the **OK** button.

Producing the Summary Report

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

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

Generating the Summary Report

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

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

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

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

For example: 8234321_SC1_820LL17_001_Summary_Report.html.

It is important that the Head Teacher checks all the information on the Summary report before the return is authorised. Your LA might request that a copy of the Summary report is signed by the Head Teacher and sent to the LA when the return has been authorised.



More Information:

Configuring the Census Folder on page 12
Generating Detail Reports on page 42
Transferring Report Data to a Spreadsheet on page 44
Authorising the Return on page 46
Deleting an Unauthorised Return on page 51

Editing an Unauthorised Return

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

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

1. Select **Routines | Statutory Returns | <census name>** to display the browser.
2. Ensure that the **Census Folder** and the **Security message for Reports** are correct then click the **Search** button to display any previously created returns. Unauthorised returns can be recognised by their .UNA suffix.

3. Double-click the required return. Alternatively, highlight the required return then click the **Open** button to display the **Census Return Details** page.
4. Edit the return details as required.
5. Ensure that the correct value for historical spot allowances has not been specified via **Tools | Setups | Employment Parameters**.
6. Click the **Create & Validate** button to display the **Validation Errors Summary** panel.
7. Resolve any errors and check any queries before running the Summary report and detail reports to ensure that the information is correct.
8. Repeat the editing process again, if necessary.
9. Click the **Save** button.



More Information:

Configuring the Census Folder on page 12
Specifying the Security Message for Reports on page 13
Resolving Validation Errors and Checking Queries on page 35
Producing Detail Reports on page 38
Producing the Summary Report on page 45

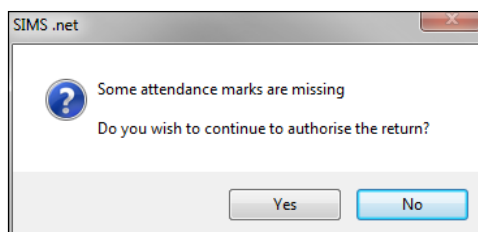
Authorising the Return

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

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

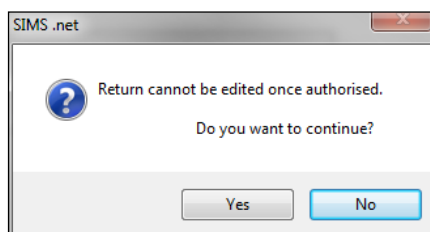
1. Click the **Authorise** button.

If missing marks exist, the following message is displayed.



2. Click the **Yes** button to continue with the authorisation process or the **No** button if you want to return to SIMS where the missing marks can be entered.

If you choose to continue, a message reminds you that the return cannot be edited once it is authorised.



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

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

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

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

6. Click the **Continue** button to authorise the return.
 - The Summary report, Authorisation report and Validation Errors Summary report are generated automatically and displayed in your web browser, from where they can be printed, if required.
 - The return file extension changes automatically from UNA (unauthorised) to XML (authorised).
 - All details, i.e. the reports and the XML file, are saved in the **Census Folder**, which was specified previously in the **Census Return for <season> <year> Term** browser.

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

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

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

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

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



Additional Resources:

Designing and Running Reports handbook



More Information:

Producing the Summary Report on page 45

Retrieving Authorised Census Return Files on page 49

Copying a Return on page 50

Submitting the Return

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

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

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

Retrieving Authorised Census Return Files

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

1. Select **Tools | Statutory Returns Tools | Retrieve Authorised Census Return Files** to display the **Retrieve Authorised Census Return Files for <census name>** page.
2. Select the type of census required from the **Return Type** drop-down list to display a list of previous returns that match the selected criteria.
3. By default, the files **Download to** the folder specified in the census browser. To specify a different folder:
 - a. Click the **Select a Folder** button (...) to display a standard Windows® **Browse For Folder** dialog. Navigate to the location of the required folder then highlight it. If a suitable folder does not exist, click the **Make New Folder** button then enter a suitable folder name.

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

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

- b. Click the **OK** button to select or create the folder then return to the **Retrieve Authorised Return Files for <census name>** page where the chosen folder name is displayed in the **Download to** field.
4. Highlight the return you wish to retrieve then click the **Retrieve Files** button. The authorised return file (i.e. the XML file) and all reports associated with the selected return are downloaded from your DMS to the specified folder. The folder and its contents are then displayed automatically, enabling you to open the required files in your web browser.
5. The contents of the specified folder can be viewed again by clicking the **Folder** button adjacent to the **Download to** field.

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

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

The screenshot displays the report design interface with three main panels:

- Select Data Area:** Shows a tree view with 'Student' selected under the 'People' category. Below the tree, it states: "The chosen focus will become the rows of your report". Navigation buttons include '<< Back', 'Next >>', and 'Finish'.
- Select fields to be included in the report (Focus: Student):** A list of fields is shown on the left, including 'Person_id', 'Conduct...', 'History...', 'SEN...', 'School...', 'UDF', 'EMA Information', 'Email', 'Telephone', 'Performance Summary', 'Prior Attainment', 'Classes', 'Courses', 'Assessment results', 'Parents', 'Family links', 'Contacts', 'Attendance marks', 'Lesson marks', 'Report Card', 'Exams', 'Group membership', 'Group membership (Historic)', 'Achievements', 'Behaviour', 'Student Conduct Informatic', 'Exclusions', 'Suspensions(NI)', 'Concessions', 'Agents Involved', 'Agencies Involved', 'Behaviour Student Involve', 'Achievement Student Invo', 'Detention Student involve', 'Deposit Fees', 'Registration Fees', 'Advanced Payments', 'AD Provisioning', 'Communications', 'Performance Detail', 'Timetable Details', 'Partnership Guests', 'Student Interventions', 'Homework', 'Post-16 Programmes of St', 'Published Documents', and 'Statutory Returns'. The 'Statutory Returns' field is highlighted.
- Select fields to be included in the report (Focus: Statutory Returns):** A list of fields is shown on the left, including 'Authorised Date', 'File Name', and 'Return Description'. The 'Statutory Returns [Count]' field is highlighted.



Additional Resources:

Designing and Running Reports handbook

Copying a Return

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

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

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

1. Select **Routines | Statutory Returns | <name of census>** to display the census browser.
2. Click the **Search** button to ensure that the list of returns is displayed.
3. Highlight the file you wish to copy then click the **Copy** button.

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

IMPORTANT NOTE: Any values for attendance (where applicable), Early Years, Post Looked After Arrangements and Top-up Funding will not be copied but will be populated from the current values held in the database. The Create & Validate routine must be run to generate a new census file.

4. Click the **Yes** button to make the copy, which is then displayed in the browser as:
Copy of <description of selected file>.
5. To rename the copied return, highlight it then click the **Open** button to display the **Return Details** page.
6. In the **Census Details** panel, edit the **Description** then click the **Save** button.

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

Deleting an Unauthorised Return

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

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

IMPORTANT NOTES: When a return file is deleted, any associated files, e.g. Validation Errors Summary, detail reports, etc. that have been produced are also deleted.

Any return files that have already been authorised cannot be deleted.

1. Select **Routines | Statutory Returns | <Return name>** to display the browser.
2. Click the **Search** button to ensure that the list of return files is displayed.
3. Highlight the return file to be deleted then click the **Delete** button. A message prompts for confirmation that the selected return should be deleted.
4. Click the **Yes** button to permanently delete the selected return file and all associated report files.

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

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