



Applicable to 7.172 onwards

# Producing the School Census Spring 2017 Return

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English Special Schools



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## Overview

This handbook provides the information needed by Special schools 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 pupil/student details, e.g. pupil/student address, free school meals, exclusions, etc. Different data is collected depending on which return is being prepared and your school phase.

A list of items collected from Special schools in England for the School Census Spring 2017 Return is available in a later section of this handbook.

*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 YTI)
- 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 | Pupil (or Student) | Pupil (or 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.

The following data items are collected for the first time for Nursery schools:

- **First Language**
- **Ethnicity.**



#### Additional Resources:

*Managing Pupil/Students handbook*



#### More Information:

*Producing Detail Reports on page 41*

### Data Items Removed from the Census

#### Focus | School | School Details - Address panel

#### Focus | Pupil (or Student) | Pupil (or Student) Details - Welfare panel

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

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

### 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**.



#### More Information:

*Updating Early Years Data on page 20*  
*Early Years Report on page 44*

## 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 Pupil/Students Post Looked After Arrangements on page 25*

## Special School Attendance Data

### Routines | Statutory Return | School Census

In the School Census Spring 2017 Return, the DfE requires termly attendance data to be collected for Special schools.

The collection dates are consistent with other school phases, e.g. from the start of the Autumn term (e.g. 01/09/2016) to 31/12/2016.



#### More Information:

*Entering Attendance Information* on page 32

## 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.

## 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

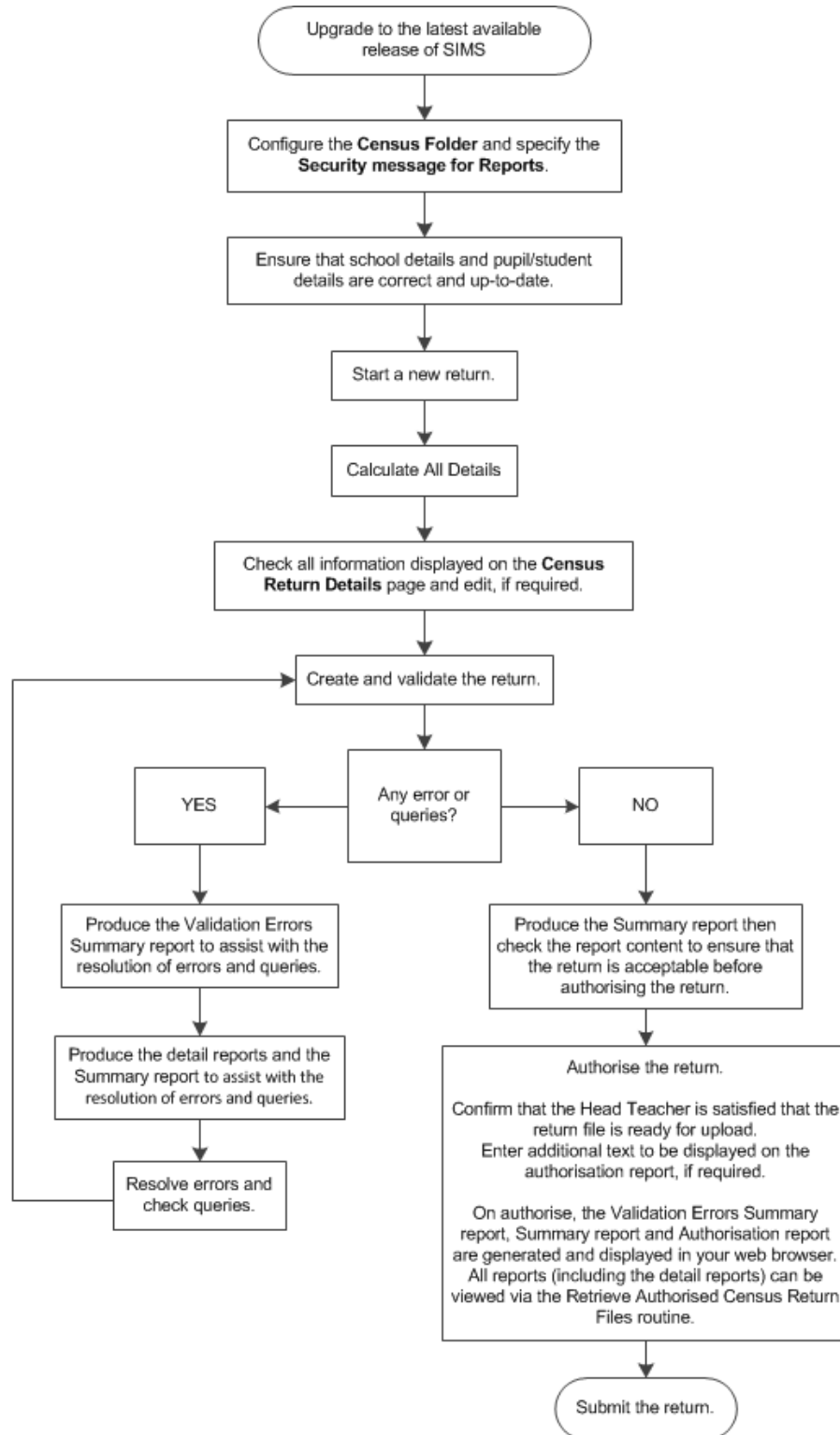
In addition to this handbook, a preparation guide that outlines how to prepare your data for the School Census, together with an Errors and Resolutions document that provides suggestions on how to resolve any validation errors or queries, are also available.

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



## 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.



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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. pupil/student details, school details, etc. These users must be a member of any of the following user groups in System Manager:

- Administration Assistant
- Admissions Officer
- School Administrator.

### Importing Revised Files

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

- Returns Manager
- System Manager.

For more information about the Import Fileset functionality, please refer to the applicable preparation guide, available on 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 pupil/student level information is present and accurate in SIMS. For example, ensure that school details are correct, all new pupil/students have been added to SIMS, all leavers have been recorded and where applicable all exclusions have been recorded, etc.

The following information is collected from Special schools for the School Census Spring 2016 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
  - Special school organisation (accommodation), maximum day pupil/students, maximum boarding pupil/students, minimum and maximum age for boys, minimum and maximum age for girls and school SEN type (as used in the School Census).
- Miscellaneous:
  - free school meals taken
  - childcare provision on site, signposted off site childcare provision, type of childcare (e.g. before school, after school, etc.), number of childcare places, childcare provider, number of weeks that the childcare provision is open, other schools, opening time and closing time.

**Pupil/Student Level Data**

- Pupil/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.
- Pupil/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
  - Youth Support Services Agreement (YSSA) indicator, post looked after arrangements
  - service children in education indicator
  - funded hours, hours at setting, learner support code, top-up funding indicator
  - early years pupil premium eligibility (EYPPE) and early years pupil premium basis of funding (EYPPBF).
- Pupil/Student Status: enrolment status, date of entry, date of leaving, part-time indicator, boarder indicator, actual national curriculum year group.
- Special Educational Needs: SEN provision, SEN type ranking, SEN type for each SEN need.
- Termly Exclusion Information (28/03/2016 to 31/08/2016): exclusion category, exclusion reason, in care indicator, SEN provision, exclusion start date, actual number of sessions excluded from.
- Pupil/Student Home Address Information: full 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, reason for absence code 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 pupil/student and school information is present and accurate in SIMS.

The School Census Spring 2017 Return collects data for:

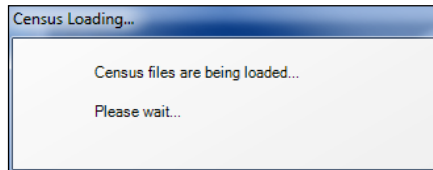
- all pupil/students on the register on 19/01/2017 (census day).
- any additional pupil/students not on-roll on census day who:
  - had an exclusion that started between 28/03/2016 and 31/08/2016.
  - were awarded Learner Support funding from 01/08/2016 to 19/01/2017.

The **Census Folder** and **Security message for Reports** must be specified before clicking the **New** button to create a new return.

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 53).

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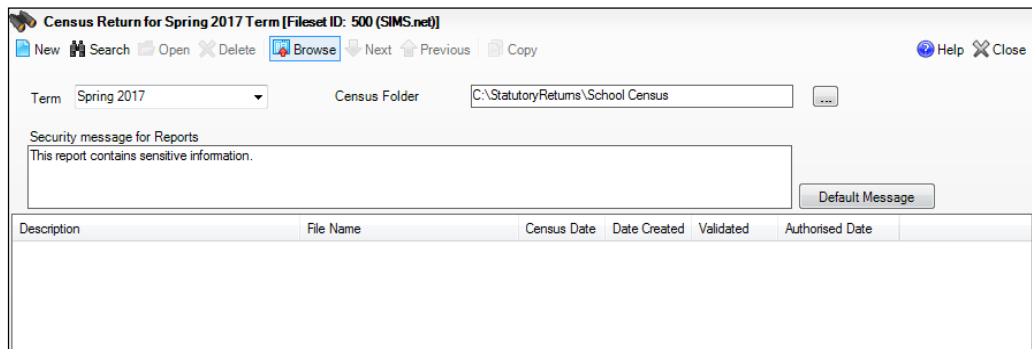
1. Select **Routines | Statutory Returns | School Census** to load the School Census validation and reporting files.



**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, 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.

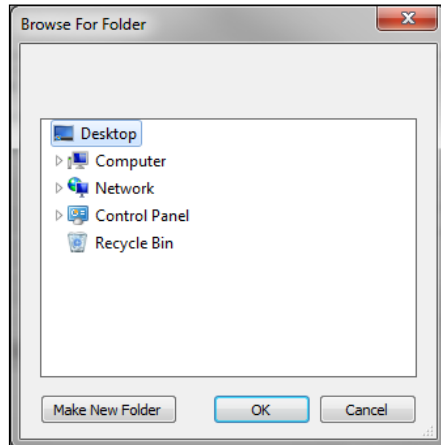
**IMPORTANT NOTE:** Due to the sensitive nature of some of the data stored in SIMS, careful consideration should be given when specifying the location of any folder into which you save sensitive data, e.g. census returns, imported and exported CTFs, etc.

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 28/13/2016 to 31/08/2016.
- FSM (Free School Meal) data collected from 07/10/2016 to 19/01/2017.
- Learner Support data collected from 01/08/2016 to 19/01/2017.

The screenshot shows the 'Census Details' panel with the following fields:

Census Date	19/01/2017	Calculate All Details
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.
3. 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.

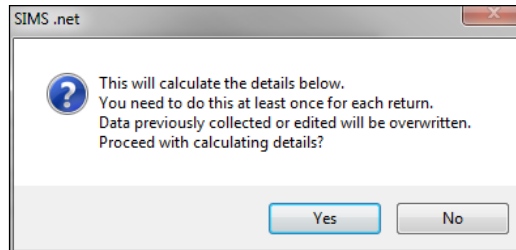
Do not use the **Calculate All Details** button more than once if you wish to keep any changes you have made. Clicking the **Calculate All Details** button overwrites any previously collected or edited data (in every panel where details are calculated automatically) with the data currently stored in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



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

2. 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 | Pupil (or Student) | Pupil (or 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.

2 School Information			
School Name	Dean Special School		
LA	886	Establishment Number	4676
School Address	Dean Special School Grassy Oaks Ave. Hiseville O64U 0IC		
Telephone	01234 543211		
School E-mail Address	bpwm.lux@sainfoin.com		
School Phase	SP	Special	
School Type	Special School		
Governance	Community	Intake Type	Special
Lowest NC Year	R	Highest NC Year	14
<input type="button" value="School Detail"/>			

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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.

The screenshot shows the 'School Detail' dialog box for 'Dean Special School'. The 'Establishment' tab is selected. The form contains the following fields and values:

School Name	Dean Special School
LA	886 Kent
Establishment Number	4676
Unique Reference Number	
School Phase	Special
School Type	Special School
School Governance	Community
Intake Type	Special
Previous School Name	
Previous Estab Number	
Previous URN Number	
Boarding Pupils	<input type="checkbox"/> Nursery Class <input type="checkbox"/>
Head Teacher	Mr Ryan Nelson Calvetti
Curriculum Years	R 14
Date Name Changed	
Date Number Changed	
Date Number Changed	
Special Class or Unit	<input type="checkbox"/>
Main Contact	R Amo

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

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

#### Information for Academies:

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

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

*NOTE for Sponsor-led Academies where the DfE number has changed: If applicable, the date of arrival is reported as the date the DfE number changed and historical information from before this is 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.

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						

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

**School Detail**

**School Details - Dean Special School**

Save | Undo | Help

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

**1 Establishment**

School Name: Dean Special School

LA: 886 Kent

Establishment Number: 4676

Unique Reference Number:

School Phase: Special

School Type: Special School

School Governance: Community

Intake Type: Special

Previous School Name:

Previous Estab Number:

Previous URN Number:

Boarding Pupils:  Nursery Class

Head Teacher: Mr Rylan Nelson Calvetti

Curriculum Years: R | 14

Date Name Changed:

Date Number Changed:

Date Number Changed:

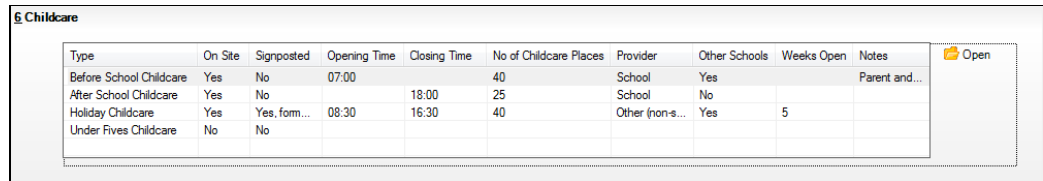
Special Class or Unit:

Main Contact: R. Amo

OK | Cancel

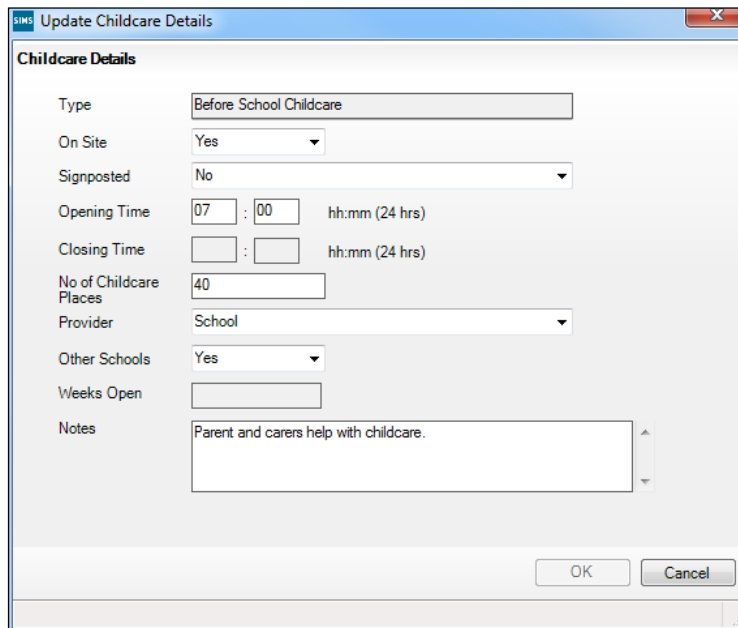
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2. Click the **Childcare** hyperlink to display the **Childcare** panel, where the current childcare details are displayed.



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, fom...	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.



Update Childcare Details

**Childcare Details**

Type: Before School Childcare

On Site: Yes

Signposted: No

Opening Time: 07 : 00 hh:mm (24 hrs)

Closing Time: : hh:mm (24 hrs)

No of Childcare Places: 40

Provider: School

Other Schools: Yes

Weeks Open:

Notes: Parent and carers help with childcare.

OK Cancel

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 is not 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 pupil/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 pupil/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 Early Years Data

Hours at Setting and Funded Hours can be recorded in the **Early Year** panel (on the **Census Return Details** page) or via **Tools | Statutory Returns Tools | Early Years - Update Early Years** page.

The hours are collected from all school phases that have early years pupils on-roll on census day.

The hours collected in this return are for the week in which the census day falls.

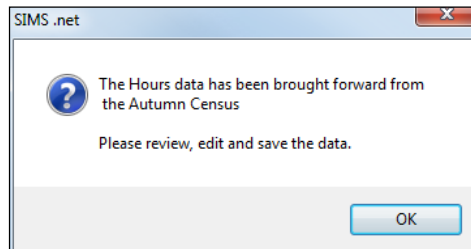
If data has been recorded previously via **Tools | Statutory Return Tools | Update Early Years**, the values are displayed in the **Early Years** panel.

Name	Date of Birth	Gender	AdNo.	YTI	Reg	Age at 31/08/2016	Age at 31/12/2016	Hours at Setting	Funded Hours
Abhra,Shagab	17/12/2013	Male	001502			2	3		
Adams,Sadie	20/03/2013	Female	001521	N2	AM	3	3		
Alyona,Tatyana	21/12/2012	Female	001522	N2	PM	3	4		
Andrews,Richard	02/12/2012	Male	001523	N2	AM	3	4		
Bronislaw,Tomaz	06/04/2013	Male	001524	N2	PM	3	3		
Clarke,Harriette	09/11/2012	Female	001525	N2	AM	3	4		
Davies,Adam	01/12/2012	Male	001526	N2	AM	3	4		

The **Early Years** panel is read-only. However, you can review and edit the data by clicking the **Edit** button.

### Adding/Editing Hours at Setting or Funded Hours

1. Click the **Edit** button to display a message that informs you that hours data has been brought forward from the previous census.



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

**Update Early Years**

Save Undo

**Census** Term Spring 2017

**Pupils View** Age at 31/08/2016 All YTI All Reg All Status All

Name	Date of Birth	Gender	AdNo.	YTI	Reg	Age at 31/08/2016	Age at 31/12/2016	Hours at Setting	Funded Hours
Abhra, Shaquib	17/12/2013	Male	001582			2	3		
Adams, Sadie	20/03/2013	Female	001521	N2	AM	3	3		
Alyona, Tatyana	21/12/2012	Female	001522	N2	PM	3	4		
Andrews, Richard	02/12/2012	Male	001523	N2	AM	3	4		
Bronislaw, Tomaz	06/04/2013	Male	001524	N2	PM	3	3		
Clarke, Harriette	09/11/2012	Female	001525	N2	AM	3	4		
Davies, Adam	01/12/2012	Male	001526	N2	AM	3	4		
Delanve, Millicent	10/02/2014	Female	001583			2	2		
Elliott, Josef	15/02/2013	Male	001527	N2	PM	3	3		
Ellis, Paul	08/02/2014	Male	001584			2	2		
Erikson, Finley	23/12/2012	Male	001528	N2	AM	3	4		
Gilbey, Clarissa	10/04/2013	Female	001529	N2	AM	3	3		
Gorev, Edgar	20/05/2013	Male	001530	N2	AM	3	3		
Haddon, Magdalene	21/02/2013	Female	001531	N2	AM	3	3		
Hellerton, Brooke	10/03/2013	Female	001532	N2	PM	3	3		
Jones, Daniel	16/11/2012	Male	001533	N2	PM	3	4		
Kaur, Aafia	04/04/2014	Female	001585			2	2		
Lin, Jian	22/01/2014	Male	001586			2	2		
Lowes, Ching	01/02/2013	Male	001534	N2	PM	3	3		

If you wish to view the data recorded for a previous term (in the current calendar year), select as required from the drop-down list.

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

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

**IMPORTANT NOTE:** Hours must be entered in increments of 0.5 only.

**Census** Term Spring 2017

**Pupils View** Age at 31/08/2016 All YTI All Reg All Status All

Name	Date of Birth	Gender	AdNo.	YTI	Reg	Age at 31/08/2016	Age at 31/12/2016	Hours at Setting	Funded Hours
Abhra, Shaquib	17/12/2013	Male	001582			2	3	12.5	12.5
Adams, Sadie	20/03/2013	Female	001521	N2	AM	3	3	15	15
Alyona, Tatyana	21/12/2012	Female	001522	N2	PM	3	4	10	10
Andrews, Richard	02/12/2012	Male	001523	N2	AM	3	4	15	15
Bronislaw, Tomaz	06/04/2013	Male	001524	N2	PM	3	3	15	15
Clarke, Harriette	09/11/2012	Female	001525	N2	AM	3	4	15	15
Davies, Adam	01/12/2012	Male	001526	N2	AM	3	4	12.5	12.5
Delanve, Millicent	10/02/2014	Female	001583			2	2	15	15

4. If most of the pupils are receiving the same number of hours, the following method can be used to populate the column quickly:
  - a. In the **Pupils View** panel, select the required year group from the **Year Taught In** drop-down list. Only the selected pupils are displayed in the **Pupils** panel.
  - b. Right-click in the **Pupils** panel then select **Select All** from the drop-down list.
  - c. Click in one of the highlighted cells of the column you wish to populate, i.e. **Hours at Setting** (or **Funded Hours**), then enter the number of hours that is applicable to the majority of pupils.  
The number is entered automatically for all selected pupils.
  - d. Click to the right of the grid to deselect all.
  - e. Edit the entry for each pupil who is receiving a different number of hours. This is achieved by highlighting the required pupil, clicking in the associated **Hours at Setting** (or **Funded Hours**) cell, as applicable, then entering the required number.
5. Click the **Save** button. If there are any pupils for whom zero hours have been recorded, a message is displayed. Click the **Yes** button to save the data or the **No** button to return to the **Update Hours** page where the number of hours can be entered before saving.
6. Click the **OK** button to return to the **Census Return Details** page, where the updated hours are displayed in the **Early Years** panel.

**IMPORTANT NOTES:**

*If, while completing the return, any of the following processes are performed, click the **Recalculate** button (located on the top right hand side of the panel) to ensure that the up-to-date data is displayed in the **Early Years** panel:*

- *Hours at Setting or Funded Hours are edited via the **Tools** menu*
- *a new pupil is added in SIMS*
- *a pupil's date of birth is amended.*

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

### Identifying which Children have no Hours Recorded

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



## Updating Pupil/Students with Top-Up Funding

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

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

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

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 pupil/student, must be done via the **Edit** button.

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

**Update Students with Top-up Funding**

Update

Term:  Students On-Roll on Census Day

Surname:  Forename:  YTI:  Reg:

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

Top-up Funding

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

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

Term:  Students On-Roll on Census Day

Surname:  Forename:  YTI:  Reg:

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

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

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

Term:  Students On-Roll on Census Day

Surname:  Forename:  YTI:  Reg:

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

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

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
White	White	Aurora	4	4SL		No
Whitemore	Whitemore	Amie	2	2JB		No

4. To remove a pupil/student from the list, highlight the required pupil/student then click the **Remove** button. The pupil/student's record is displayed in the first table, providing a chance to reselect the pupil/student, if required.
5. Click the **Update** button to save the data and arrange the list of pupil/students in **Surname** order.
6. Click the **OK** button (located at the bottom right-hand side of the screen) to return to the **Census Return Details** page, where the updated information is displayed in the **Top-up Funding** panel.



#### Additional Resources:

*Preparing for the School Census Spring 2017 Return handbook*



#### More Information:

*Top-up Funding Report on page 43*

## Editing Pupil/Students Post Looked After Arrangements

The Post Looked After Arrangements routine provides schools with the ability to record whether pupil/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 pupil/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 pupil/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 pupil/student, must be done via the **Edit** button.

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- Click the **Edit** button to display the **Update Pupil (or Student)s Post Looked After Arrangements** page. Any pupil/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

Post Looked After Arrangements Add Remove

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"/>

- Click the **Search** button to display a list of all pupil/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:  Forename:  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 pupil/students who you want to record as having PLAA then click the **Add** button to move the selected pupil/students to the second panel. One or more pupil/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 pupil/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 pupil/students in surname order.

If you have indicated that evidence has been obtained, you are reminded to ensure that the necessary documents are stored securely outside of SIMS or within the Document Management Server. 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 43

## Managing School Dinners Taken on Census Day

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

*NOTE for Special schools: The School Dinner Taken routine is applicable to Special schools that have on-roll pupils who have taken a school dinner on census day and who are in Year Taught In Reception, Year 1 or Year 2 and those in Year Taught In X aged four to six who were born between 01/09/2009 and 31/08/2012 inclusive.*

All pupils in Reception, Year 1 and Year 2 in English state-funded schools are offered a Universal Infant School Meal, i.e. a hot meal at lunchtime. This applies to Academies, Free Schools and Pupil Referral Units, as well as to schools maintained by the local authority. The School Census Spring 2017 Return collects information about pupils who receive a Universal Infant School Meal (school dinner) on census day.

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

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

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

8 School Dinner Taken

Reference Date: 19/01/2017

All pupils including those eligible for FSM should be included below

Group By

Calculate From Attendance

Calculate From Dinner Money

Surname	Forename	Yr	Reg Group	Enrol Status	School Dinner Taken
Abhra	Abjit	2	2JB	Single Registration	
Abhra	Alisha	2	2JB	Single Registration	
Abhra	Neel	2	2GH	Single Registration	
Ackton	Stan	2	2GH	Single Registration	
Adams	Nancy	R	ELM	Single Registration	
Akeman	Richard	1	ELM	Single Registration	
Akeman	Steven	1	ELM	Single Registration	
Alata	Candis	R	PINE	Single Registration	
Alamilla	Sofa	1	PINE	Single Registration	
Andrews	Josef	2	2GH	Single Registration	
Bailey	Eve	2	2JB	Single Registration	
Balik	Karolina	1	ASH	Single Registration	
Balinski	Cyla	2	2JB	Single Registration	
Balinski	Fil	2	2JB	Single Registration	

Total Taken: 0 Total Not Taken: 180

Tick All

Reset

1	By default, the <b>Reference Date</b> is set to 19/01/2017 (census day). If, due to exceptional circumstance, e.g. flooding, pupils were unable to take a school dinner on census day, the reference date can be changed to a date that reflects the normal situation.
2	Click the required column header to sort the data.
3	The <b>Calculate From Attendance</b> button is displayed only if SIMS Attendance is in use.
4	The <b>Calculate from Dinner Money</b> button is displayed only if SIMS Dinner Money is in use.
5	When the <b>Reset</b> button is clicked all existing ticks are removed from the <b>School Dinner Taken</b> column enabling you to start the process again.
6	The <b>Total Taken</b> and <b>Total Not Taken</b> provide an indication of whether the number of school dinners taken is correct or whether edits are required.

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



#### More Information:

*School Dinner Taken Report* on page 42

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

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

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

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

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

Surname	Forename	YTI	Reg Group	Enrol Status	School Dinner Taken
Abhra	Abjit	2	2JB	Single Registration	✓
Abhra	Alisha	2	2JB	Single Registration	✓
Abhra	Neel	2	2GH	Single Registration	✓
Ackton	Stan	2	2GH	Single Registration	
Adams	Nancy	R	ELM	Single Registration	
Akeman	Richard	1	ELM	Single Registration	✓
Akeman	Steven	1	ELM	Single Registration	✓
Alala	Candis	R	PINE	Single Registration	
Alamilla	Sofia	1	PINE	Single Registration	
Andrews	Josef	2	2GH	Single Registration	✓
Bailey	Eve	2	2JB	Single Registration	
Balik	Karolina	1	ASH	Single Registration	
Balinski	Cyla	2	2JB	Single Registration	
Balinski	Fil	2	2JB	Single Registration	✓

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

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

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

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

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

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

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

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

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

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



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

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

If missing marks exist, a message is displayed:

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

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

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

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

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

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

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

1. Click the **Tick All** button to populate the **School Dinner Taken** column. All pupils are ticked indicating that they received a school dinner on census day.
2. Edit individual records by clicking the applicable **School Dinner Taken** cell to toggle between a tick and blank (no meal taken).

8 School Dinner Taken

Reference Date: 19/01/2017 All pupils including those eligible for FSM should be included below

Group By [v] Calculate From Attendance Calculate From Dinner Money

Surname	Forename	YTI	Reg Group	Enrol Status	School Dinner Taken
Abhra	Abjit	2	2JB	Single Registration	✓
Abhra	Alisha	2	2JB	Single Registration	✓
Abhra	Nesal	2	2GH	Single Registration	✓
Ackton	Stan	2	2GH	Single Registration	
Adams	Nancy	R	ELM	Single Registration	
Akeman	Richard	1	ELM	Single Registration	✓
Akeman	Steven	1	ELM	Single Registration	✓
Alala	Candis	R	PINE	Single Registration	
Alamilla	Sofia	1	PINE	Single Registration	
Andrews	Josef	2	2GH	Single Registration	✓
Bailey	Eve	2	2JB	Single Registration	
Balik	Karolina	1	ASH	Single Registration	
Balinski	Cyla	2	2JB	Single Registration	
Balinski	Fil	2	2JB	Single Registration	✓

Total Taken: 85 Total Not Taken: 95

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

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3. After the return has been created and validated, run the School Dinner Taken detail report and then check the report contents.
4. Continue editing until school dinner taken details are correct.

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

## Entering Attendance Information

Termly attendance data (including attendance codes and the number of sessions missed) should be provided for non-boarder pupil/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.

### 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.

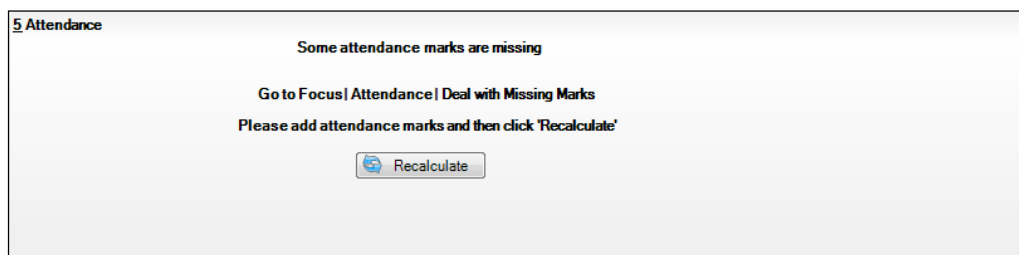
## Are your Attendance Codes DfE Compliant?

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.



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.



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.*

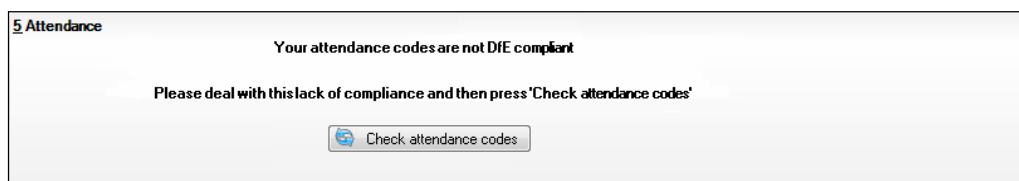


### More Information:

Producing Detail Reports on page 41

## 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.



**03| Producing the School Census Spring Return**

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 Application not in use. Manual entry is required. Check for additional student & zero totals

Group By - Attendance Collection Period (01/09/2016-31/12/2016)

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	Merfin			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
Gaskey	Silvano			On Roll	0	0	0
Gaumont	Allegria			On Roll	0	0	0

1. To filter the display of pupil/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 pupil/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 pupil/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 pupil/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 pupil/students who receive Free School Meals on census day.

<b>12 General</b>	
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 pupil/students, in any year, who are eligible for Free School Meals.

- Pupil/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 pupil/students of a young age, do not include pupil/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 43

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 the Return* on page 37).

# 04 | Completing the School Census Spring Return

<b>Creating and Validating the Return .....</b>	<b>37</b>
<b>Producing Detail Reports.....</b>	<b>41</b>
<b>Producing the Summary Report.....</b>	<b>47</b>
<b>Editing an Unauthorised Return .....</b>	<b>48</b>
<b>Authorising the Return .....</b>	<b>48</b>
<b>Submitting the Return .....</b>	<b>51</b>
<b>Retrieving Authorised Census Return Files .....</b>	<b>51</b>
<b>Copying a Return.....</b>	<b>52</b>
<b>Deleting an Unauthorised Return .....</b>	<b>53</b>

## Creating and Validating the Return

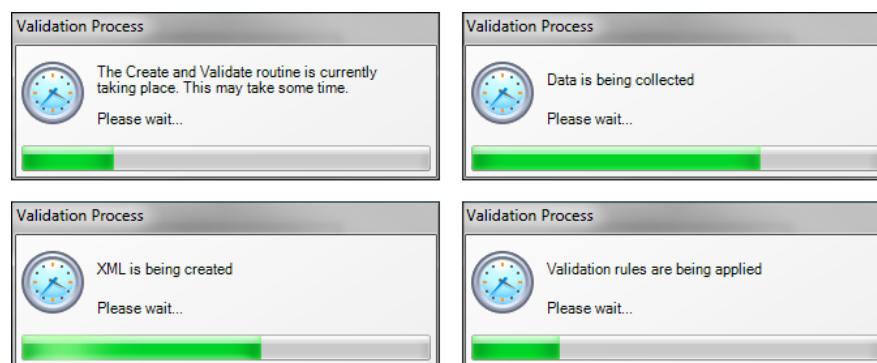
A return must be created, validated and authorised before it can be sent to your Local Authority or uploaded to the DfE COLLECT data collection website (as applicable to your school).

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 is no special educational needs data.

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 amount of data to be processed.

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



## 04| Completing the School Census Spring Return

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.

Type	Sequence	Message	Location	Solution
F	1500	UPN missing	Name: Abraham, Jane Date of Birth: 2005-05-19, Female/UPN:	# Go to Focus   Student   Student Details and add or issue a UPN
F	1500	UPN missing	Name: Reid, Rosie Date of Birth: 2009-03-07, Female/UPN:	# Go to Focus   Student   Student Details and add or issue a UPN
F	1840	Pupils aged 5 and over Language missing or invalid	Name: Henderson, Jacki Date of Birth: 2010-05-07, Male/UPN: KB23299914029	# Go to Focus   Student   Student Details Ethnic/Cultural panel and enter First language
F	2360	Insufficient Address information provided	Name: Bains, Kirki Date of Birth: 2005-01-18, Male/UPN: HB20200109012	# Go to Focus   Student   Student Details Addresses and edit pupil's address
Q	1601Q	Please check: Pupil's age is out of range for school type	Name: Sungail, Skaisie Date of Birth: 2003-03-38, Female, Age: 12/UPN: BB20200106088	# Go to Focus   Student   Student Details and enter pupil's date of birth
Q	1620Q	Please check: duplicate pupil records with the same Surname, Forename, Gender and Date of birth	Name: Bennison, Hugo Date of Birth: 2010-02-03, Male/UPN:	# Go to Focus   Student   Student details and check for duplicate pupil record
Q	1620Q	Please check: duplicate pupil records with the same Surname, Forename, Gender and Date of birth	Name: Bennison, Hugo Date of Birth: 2010-02-03, Male/UPN: VB23299914008	# Go to Focus   Student   Student details and check for duplicate pupil record
Q	2355Q	Please check: Pupil record with no address details	Name: Balinski, Cylai Date of Birth: 2010-03-14, Female/UPN: CB23299914005	# Go to Focus   Student   Student Details Addresses and edit pupil's address
Q	2520Q	Please check: sessions possible should not be greater than 150	Name: Aaron, Lizi Date of Birth: 2005-09-01, Female/UPN: JS20200109032	# Go to Focus   Attendance (Lesson Monitor)   Display Marks and check the attendance marks
Q	2520Q	Please check: sessions possible should not be greater than 150	Name: Aaron, Sophie Date of Birth: 2005-09-01, Female/UPN: MB20200109034	# Go to Focus   Attendance (Lesson Monitor)   Display Marks and check the attendance marks

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

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

Column	Description
<b>Type</b>	Displays the type of validation rule: Failure ( <b>F</b> displayed in red) indicates an error, which must be corrected. Query ( <b>Q</b> displayed in black) indicates that there are unusual data conditions. These should be considered and corrected, if necessary.
<b>Sequence</b>	Shows the error or query number.
<b>Message</b>	Displays the text of the error or query message.
<b>Location</b>	Lists the specific record containing the error or query.
<b>Solution</b>	Provides a suggestion on how the error can be corrected or the query checked. Many solutions have a hyperlink (indicated by a #) 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: 2005-05-19, Female/UPN:	# Go to Focus   Student   Student Details and add or issue a UPN
F	1500	UPN missing	Name: Reid, Rosel Date of Birth: 2009-03-07, Female/UPN:	# Go to Focus   Student   Student Details and add or issue a UPN
F	1540	Pupils aged 5 and over Language missing or invalid.	Name: Henderson, Jacki Date of Birth: 2010-05-07, Male/UPN: K823299914029	# Go to Focus   Student   Student Details Ethnic/cultural panel and enter First language
F	2350	Insufficient Address information provided.	Name: Bains, Kirki Date of Birth: 2005-01-18, Male/UPN: H820200109012	# Go to Focus   Student   Student Details Ethnic/cultural panel and enter First language
Q	1901Q	Please Check: Pupil's age is out of range for school type.	Name: Surgal, Skasael Date of Birth: 2003-03-28, Female, Age: 12/UPN: B820200106088	# Go to Focus   Student   Student Details and enter pupil's date of birth.

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

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

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

Type	Sequence	Message	Location	Solution
F	1500	UPN missing	Name: Abraham, Janel Date of Birth: 2005-05-19, Female/UPN:	# Go to Focus   Student   Student Details and add or issue a UPN
F	1500	UPN missing	Name: Reid, Rosel Date of Birth: 2009-03-07, Female/UPN:	# Go to Focus   Student   Student Details and add or issue a UPN
F	1540	Pupils aged 5 and over Language missing or invalid.	Name: Henderson, Jacki Date of Birth: 2010-05-07, Male/UPN: K823299914029	# Go to Focus   Student   Student Details Ethnic/cultural panel and enter First language
F	2350	Insufficient Address information provided.	Name: Bains, Kirki Date of Birth: 2005-01-18, Male/UPN: H820200109012	# Go to Focus   Student   Student Details Addresses and edit pupil's address
Q	1901Q	Please Check: Pupil's age is out of range for school type.	Name: Surgal, Skasael Date of Birth: 2003-03-28, Female, Age: 12/UPN: B820200106088	# 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 pupil/student are displayed in the **Student Search** field. Click the **Find** button to display all errors and queries relating to that pupil/student.

Type	Sequence	Message	Location	Solution
F	1500	UPN missing	Name: Abraham, Janel Date of Birth: 2005-05-19, Female/UPN:	# Go to Focus   Student   Student Details and add or issue a UPN
Q	2520Q	Please check: sessions possible should not be greater than 150	Name: Abraham, Janel Date of Birth: 2005-05-19, Female/UPN:	# Go to Focus   Attendance (Lesson Monitor)   Display Marks and check the attendance marks



## 04| Completing the School Census Spring Return

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

Type	Sequel	Location	Solution
Q	1601Q	check: Pupil's age is out of range for school type.	Name: Surrall, Skaezel Date of Birth: 2003-03-28, Female, Age: 12 UPN: 8620200106088
Q	1602Q	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	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: Y623299914008
Q	2350Q	check: Pupil record with no address details.	Name: Balinski, Cyla  Date of Birth: 2010-05-14, Female UPN: C823299914005
Q	2520Q	check: sessions possible should not be greater than 150	Name: Aaron, Liz  Date of Birth: 2005-09-01, Female UPN: J620200109032
Q	2520Q	Please check: sessions possible should not be greater than 150	Name: Aaron, Sophie  Date of Birth: 2005-09-01, Female UPN: M620200109034

- By default, when **ALL** is selected from the **Errors Search** drop-down list, the errors are displayed at the top of the list. The order of the items in the list can be changed by clicking the appropriate column heading.

Type	Sequel	Location	Solution
F	1500	ing	Name: Abraham, Janet Date of Birth: 2005-05-18, Female UPN:
F	1500	ing	Name: Reid, Rosie  Date of Birth: 2009-03-07, Female UPN:
F	1540	ed 5 and over Language missing or invalid.	Name: Henderson, Jacki  Date of Birth: 2010-05-07, Male UPN: K823299914029
F	2350	Address information provided	Name: Bains, Kirki  Date of Birth: 2005-01-18, Male UPN: H620200109012
Q	1601Q	check: Pupil's age is out of range for school type.	Name: Surrall, Skaezel Date of Birth: 2003-03-28, Female, Age: 12 UPN: 8620200106088
Q	1620Q	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:

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 46).

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

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

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

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

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

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

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



#### More Information:

*Transferring Report Data to a Spreadsheet* on page 46

## 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 Pupil (or Student)s** 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: pupil/students on-roll on census day.

This report provides basic information, 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 (YSSA) indicator, part-time status and boarder status.

### Leavers Basic Details Report

Report Criteria: Pupil/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, exclusion and learner support status.

## Exclusions Report

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

This report provides the following details about pupil/students who match the report criteria: UPN, legal surname, legal forename, date of birth (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.

## SEN Report

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

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

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

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

## School Dinner Taken Report

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

- Pupil/students in Year Taught In R, 1 and 2.
- Pupil/students in year Taught In X who are aged four to six and who were born between 01/09/2009 and 31/08/2012 inclusive (**Special schools only**).

The report header also displays the total number of pupil/students, the total number of school dinners taken and the total number of school dinners not taken.

This report provides the following information about pupil/students who match the report criteria: UPN, legal surname, legal forename, date of birth (DOB), gender, year taught in (YTI) and school dinner taken (yes/no).

## Free School Meal Eligibility Report

Report Criteria: On-roll pupil/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 pupil/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 pupil/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 pupil/students: UPN, legal surname, legal forename, date of birth (DOB), gender, year taught in (YTI), Learner Support and on-roll status.

## Top-up Funding Report

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

The 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 pupil/students who have post looked after arrangements as at census day.

The report provides the following information about pupil/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.
- 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.

## Early Years Report

Report Criteria:

- Pupils who are on-roll on census day:
  - All three years old pupils who were born between 01/09/2012 and 31/12/2013 (inclusive).
  - Four years old pupils (in years E1, E2, N1 and N2 only) and born between 01/09/2011 and 31/08/2012 (inclusive).
  - Four years old pupils (in Nursery only).

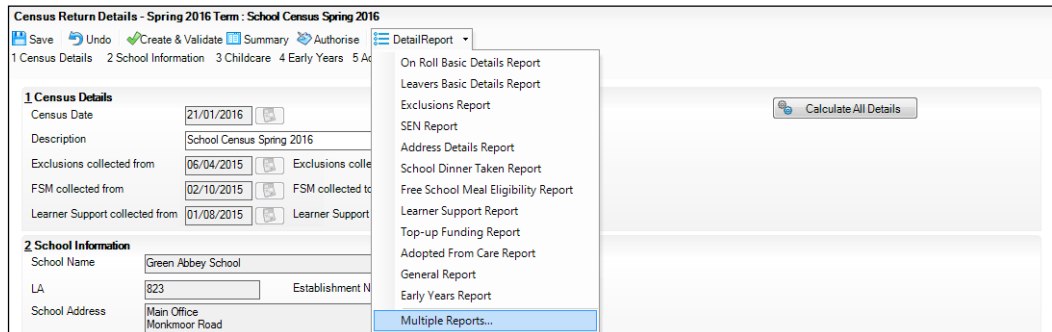
The report displays the following information: UPN, legal surname, legal forename, preferred surname, former surname, date of birth (DOB), gender, year taught in (YTI), post looked after arrangements, hours at setting, funded hours and basis for early years pupil premium eligibility (EYPPE).

*NOTE for Middle Deemed Primary schools: Although the Early Years report is not available to Middle Deemed Primary schools, information regarding Funded Hours and Hours at Setting can be viewed in the On-Roll Basic Details report.*

## Generating Detail Reports

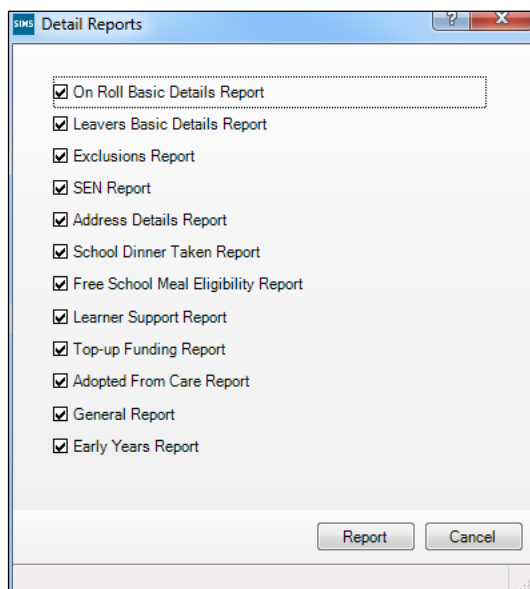
### Selecting a Single Detail Report

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:

```
8864676_SC1_886LL16_001_onroll_basic_details_report.html.
```



#### More Information:

*Configuring the Census Folder* on page 12

*Transferring Report Data to a Spreadsheet* on page 46

## 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 8864676\_SC1\_886LL16\_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 44*

*Transferring Report Data to a Spreadsheet on page 46*

*Authorising the Return on page 48*

*Deleting an Unauthorised Return on page 53*



## 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 38*  
*Producing Detail Reports on page 41*  
*Producing the Summary Report on page 47*

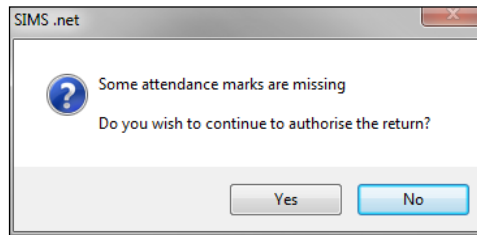
## Authorising the Return

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).

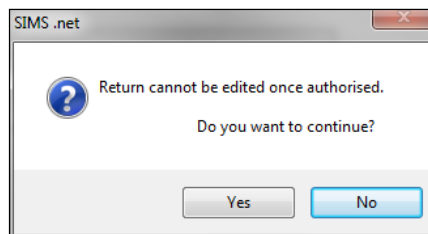
Before authorising the return, you should ensure that all the information displayed on the **Census Return Details** page is correct and does not require further editing. This is because it is not possible to edit details after the return is authorised. The Summary report can assist in reviewing the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

1. Click the **Authorise** button.

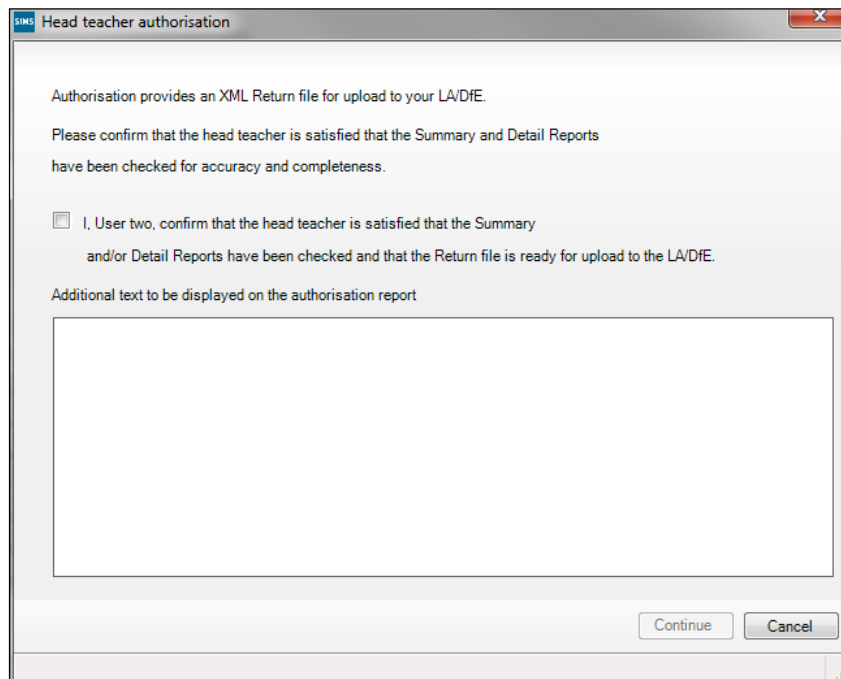
If missing marks exist, the following message is displayed.



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.



## 04 | Completing the School Census Spring Return

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 47

*Retrieving Authorised Census Return Files* on page 51

*Copying a Return* on page 52

## 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.*

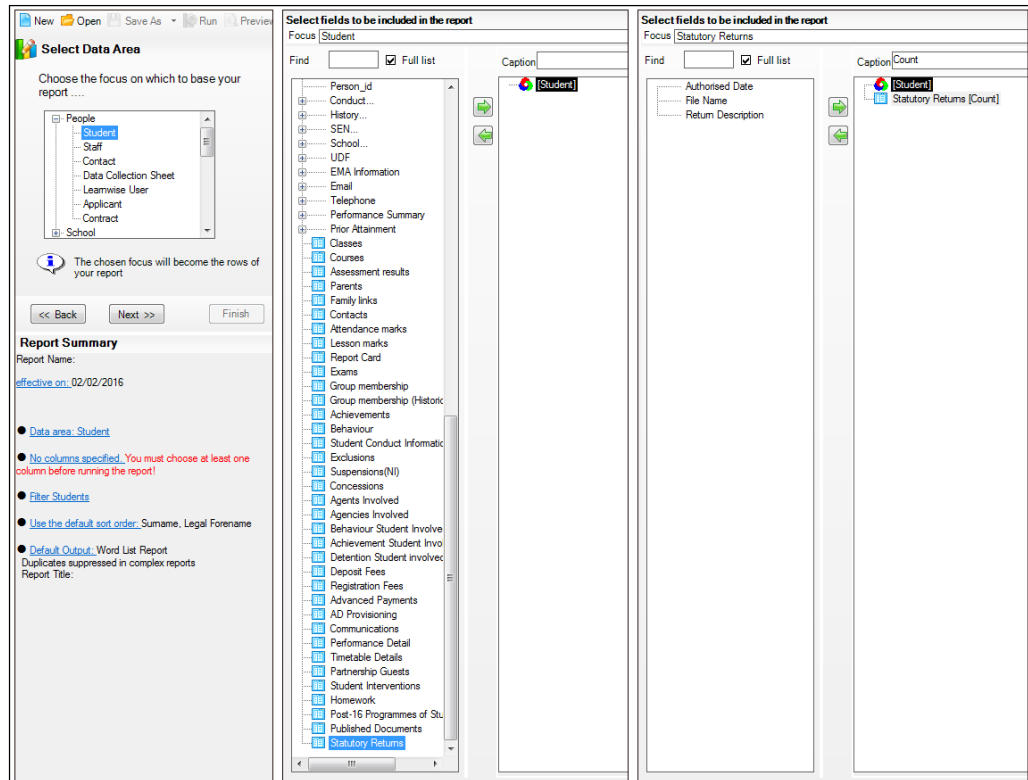
For guidance on navigating to files on your local workstation when you are working in a Hosted environment, please contact your System Manager or Local Support Unit.

- 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.

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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**.



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

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

