

Applicable to 7.174 onwards Producing the School Census Summer 2017 Return (English Nursery Schools) handbook



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01 Introduction

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Overview

This handbook provides the information needed by Nursery schools in England to complete the School Census Summer 2017 Return, which takes place on Thursday 18 May 2017.

The School Census Summer 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. Autumn, Spring and Summer), which collect detailed information about school characteristics and pupil details, e.g. pupil address, free school meals, etc. Different data is collected depending on which return is being prepared, and your school phase.

A list of items collected from Nursery schools in England for the School Census Summer 2017 Return is available in a later section of this handbook (please see *Preparing Data for the School Census Return* on page 6).

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

How has the School Census Summer Return Changed?

Changes to the School Census Summer Return include the following:

Data Items New to the Summer Return

Focus | Pupil | Pupil Details

The following new data items are collected in the return.

- **Ethnic/Cultural** panel items:
 - Nationality
 - Country of Birth
- The UPRN (Unique Property Reference Number) displayed below the address details in the Addresses panel once the address has been selected and validated.



Additional Resources:

Managing Pupil/Students handbook

Data Items Removed from the Summer Return

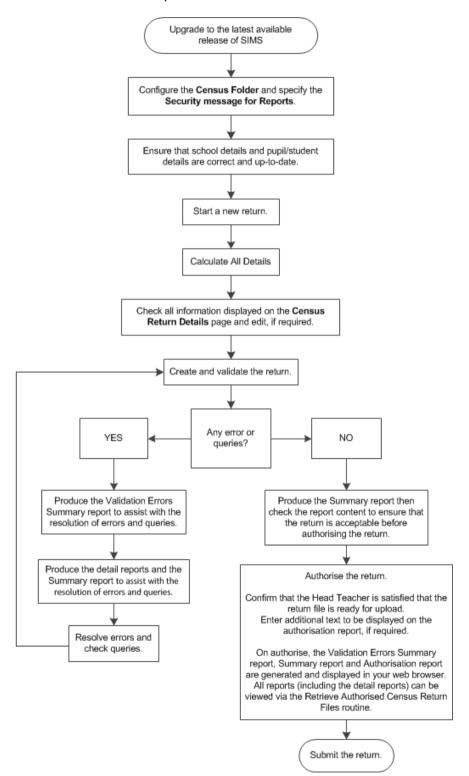
Focus | Pupil | Pupil Details - Welfare panel

In Care is no longer collected in the Summer return.

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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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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 at 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 (<u>https://myaccount.capita-cs.co.uk</u>).

- 1. Enter the required text in the **Search** field to display a list of documents that match the search criteria.
- 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.

02 Preparing for the School Census Summer Return

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

- Administration Assistant
- Admissions Officer
- Personnel 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 <u>between</u> 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 (<u>https://myaccount.capita-cs.co.uk</u>).

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 (<u>https://myaccount.capita-cs.co.uk</u>).

To find the spreadsheet, search for <sims version> sims permissions, e.g. 7.174 sims permissions.

What Version of SIMS is Required?

To run the return, you must have the SIMS 2017 Spring Release (7.174) 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 7.174 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 level information is present and accurate in SIMS. For example, ensure that school details are correct, all new pupils 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 Nursery schools for the School Census Summer 2017 Return.

School Level

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

Pupil Level

- Pupil Identifiers:
 - unique pupil number (UPN), former UPN
 - surname, forename, middle names, former surname, preferred surname
 - date of birth and gender.
- Characteristics:
 - nationality, country of birth
 - free school meal eligibility start date, end date and UK country in which the eligibility applies
 - funded hours, hours at setting, top-up funding indicator
 - post looked after arrangements.
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- Status: enrolment status, date of entry, part-time indicator, boarder indicator and actual national curriculum year group.
- Special Educational Needs: SEN Provision.
- Home Information: pupil's home address, including post code and unique property reference number (UPRN).

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

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Creating a New School Census Return

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

Data is collected for all pupils on the register on 18/05/2017 (census day).

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

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

Census Loading				
	Census files are being loaded			
	Please wait			

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

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

🐞 Cen	usus Return for Summe	r 2017 Term [F	ileaet ID: 600 (SIMS.net	01				
New	Search 🖾 Open 💥	Delete 😽 Br	owse 🖶 Next 👚 Prev	vious 📄 Copy				🙂 Help 💥 Clos
Term	Summer 2017	•	Census Folder	C:\StatutoryReturns\Sch	hool Census			
Securit	ty message for Reports							
This rep	port contains sensitive info	mation.						
							Default Mess	age
Descriptio	on		File Name	Census Date	Date Created	Validated	Authorised Date	
						1000100		

By default, **Summer 2017** is displayed in the **Term** field.

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

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

More Information:

Specifying the Security Message for Reports on page 11

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 <u>https://www.gov.uk/service-manual/technology/securing-your-information</u> 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 the **Browse For Folder** dialog.

Browse button

Browse For Folder	×
📃 Desktop	
Image: Point Computer	
🛛 🔍 Network	
P I Control Panel	
👿 Recycle Bin	
Make New Folder	OK Cancel

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.

10 Producing the School Census Summer 2017 Return (English Nursery Schools) handbook, applicable to 7.174 onwards 2. Click the **OK** button to select or create the folder and return to the browser, where the new folder name is displayed.

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

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

Specifying the Security Message for Reports

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

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

Editing Census Details

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

- Census Date: 18/05/2017
- FSM (Free School Meal) data collected from 20/01/2017 to 18/05/2017.

1 Census Details			
Census Date	18/05/2017		% Calculate All Details
Description	School Census Summer 2017		
FSM collected from	20/01/2017 FSM collected to	18/05/2017	

By default, the return **Description** is displayed as **School Census Summer 2017**.

1. Check the return **Description** and then edit, if required, e.g. to identify a dry run.

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

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

2. Click the Calculate All Details button.

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Calculating All Details

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

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

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

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

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

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

SIMS .net	
?	This will calculate the details below. You need to do this at least once for each return. Data previously collected or edited will be overwritten. Proceed with calculating details?
	Yes No

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

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

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

Editing School Information

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

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

2 School Information			
School Name	WATER BABIES NURSERY	SCHOOL	
LA	820	Establishment Number	1050
Telephone	852015		
School E-mail Address	school@ve.com		
School Phase	NS Nursey		
School Type	Maintained Nursety		
Governance	Community	Intake Type	Comprehensive
Lowest NC Year	N2	Highest NC Year	1
			School Detail

12 Producing the School Census Summer 2017 Return (English Nursery Schools) handbook, applicable to 7.174 onwards 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.

Sims School Detail				
School Details - Water Babies N	lursery School			
💾 Save 🏼 🎒 Undo				📀 Help
1 Establishment 2 Address 3 C	Contact Details 4 Sites 5 Documents	6 Childcare		魯
1 Establishment				-
School Name	Water Babies Nursery School			
LA	823 Central Bedfordshire 🔍 💥			
Establishment Number	1050			
Unique Reference Number				
School Phase	Nursery			
School Type	Maintained Nursery -			
School Governance	Community -			
Intake Type	Comprehensive -]
Previous School Name		Date Name Changed		
Previous Estab Number		Date Number Changed		
Previous URN Number		Date Number Changed		
Boarding Pupils	■ Nursery Class	Special Class or Unit		
Head Teacher	Mrs Gillian Grosvenor	Main Contact	Mrs G Grosvenor	
Curriculum Years	N1 N2			
•	m			•
			ОК	Cancel

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

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

Information for Academies:

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

• The School Type and School Governance.

Select **Academies** from the applicable drop-down lists.

- The school's **Previous Name** and **Date Name Changed**.
- The Previous Estab Number and Date Number Changed (both used by the School Census).

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

• The **Previous URN Number** (used by other census returns) and **Date Number Changed**.

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

Updating Early Years Data

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

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

Date of Birth Ranges	Phase and Year Group	Minimum Entitlement to Funded Hours
01/09/2012 and 31/03/2015 inclusive	All relevant schools and year groups	15 hours
01/09/2011 and 31/08/2012 inclusive	Nursery schools – all year groups	15 hours

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

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

Early Years											
		P Edt									_
Name D	ate of Birth	Gender	AdNo.	YTI	Reg	Age at 31/08/2016			Hours at Setting	Funded Hours	i
Abhra,Shaquib 12	7/12/2013	Male	001582	N1	NT AM	2	3	3	15	15	1
Adams,Sadie 20	0/03/2013	Female	001521	N2	АМ	3	3	4	15	15	
Alyona,Tatyana 21	1/12/2012	Female	001522	N2	PM	3	4	4	15	15	
Andrews Richard 00	2/12/2012	Male	001523	N2	АМ	3	4	4	15	15	
Bronisław.Tomaz 0	6/04/2013	Male	001524	N2	PM	3	3	3	15	15	
Clarke Harriette 00	8/11/2012	Female	001525	N2	AM	3	4	4	15	15	
Davies Adam 0'	1/12/2012	Male	001526	N2	AM	3	4	4	15	15	÷

Adding/Editing Early Years Data

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

SIMS .net	
?	The Hours data has been brought forward from the Spring Census
	Please review, edit and save the data.
	ОК

- 2. Click the **OK** button to display the **Update Early Years** page. By default, the current term is displayed in the **Census** panel.
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3. If you want to view the data recorded for a previous term (in the current academic year), select the required **Term** from the drop-down list.

date Early Years											
Save 🔄 Undo											
ensus		upils View									
Term Summer 2017 💌		Age at 31/08/2016	All	*	YTI	All 🔻	Reg A		 Status 	All	٠
upila											
Name	Date of Birth	Gender	AdNo.	YTI	Reg	Age at 31/08/2016	Age at 31/12/2016	Age at 31/03/2017	Hours at Setting	Funded Hours	*
Abhra, Shaquib	17/12/2013	Male	001582	N1	N1A_	2	3	3	15	15	
Adams.Sadie	20/03/2013	Female	001521	N2	AM	3	3	4	15	15	
Alyona,Tatyana	21/12/2012	Female	001522	N2	PM	3	4	4	15	15	
Andrews, Richard	02/12/2012	Male	001523	N2	AM	3	4	4	15	15	
Bronislaw,Tornaz	06/04/2013	Male	001524	N2	PM	3	3	3	15	15	
Clarke, Harriette	09/11/2012	Female	001525	N2	AM	3	4	4	15	15	E .
Davies,Adam	01/12/2012	Male	001526	N2	AM	3	4	4	15	15	
Delanve, Millicent	10/02/2014	Female	001583	N1	N1 PM	2	2	3	15	15	
Elliott, Josef	15/02/2013	Male	001527	N2	PM	3	3	4	15	15	
Ellis, Paul	08/02/2014	Male	001584	N1	N1 PM	2	2	3	15	15	
Erikson,Finley	23/12/2012	Male	001528	N2	АМ	3	4	4	15	15	
Gilbey.Clarissa	10/04/2013	Female	001529	N2	АМ	3	3	3	15	15	
Gorev,Edgar	20/05/2013	Male	001530	N2	AM .	3	3	3	15	15	
Haddon,Magdalene	21/02/2013	Female	001531	N2	AM.	3	3	4	15	15	
Hellerton, Brooke	10/03/2013	Female	001532	N2	PM	3	3	4	15	15	
Jones, Daniel	16/11/2012	Male	001533	N2	PM	3	4	4	15	15	
Kaur Aafia	04/04/2014	Female	001585	N1	N1 PM	2	2	2	15	15	
LinJian	22/01/2014	Male	001586	N1	N1 PM	2	2	3	15	15	
Lowes,Ching	01/02/2013	Male	001534	N2	PM	3	3	4	15	15	Ŧ

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

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

IMPORTANT NOTES: A value must be entered in each **Hours at Setting** and **Funded Hours** cell. Leaving a cell blank results in a validation error being displayed when the return is created and validated.

0 (zero) is a valid value. Hours must be entered in multiples of 0.5 only.

If the value entered is within the accepted range but higher than expected by the DfE, a validation error is displayed when the return is created and validated. An explanation as to why the value is higher should be recorded on the COLLECT Portal.

Census		Pupils View									
Term Summer 2017 👻		Age at 31/08/2016	All	٠	YTI	All 👻	Reg A		 Status 	All	•
upila											
Name	Date of Bi	rth Gender	AdNo.	YTI	Reg	Age at 31/08/2016	Age at 31/12/2016	Age at 31/03/2017	Hours at Setting	Funded Hours	Ť.
Abhra Shaquib	17/12/2013	Male	001582	N1	N1 AM	2	3	3	15	15	
Adams.Sadie	20/03/2013	Female	001521	N2	AM	3	3	4	15	15	
Alyona, Tatyana	21/12/2012	Female	001522	N2	PM	3	4	4	15	15	
Andrews, Richard	02/12/201	2 Male	001523	N/2	AN	3	4	4	15	15	
Bronisław, Tomaz	06/04/2013	Male	001524	N2	PM	3	3	3	15	15	
Clarke.Harriette	09/11/2012	Female	001525	N2	AM	3	4	4	15	15	E.
Device Adver	01/12/2012	Mala	001526	NO.	4.64	2	4	4	10	16	

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- 5. If most of the pupils are receiving the same number of hours, the following method can be used to populate the column quickly:
 - a. In the **Pupils View** panel, select the required year group from the **YTI** (Year Taught In) drop-down list. Only the selected pupils are displayed in the **Pupils** panel.
 - b. Right-click in the **Pupils** panel then select **Select All** from the drop-down list.
 - c. Click in one of the highlighted cells of the column you wish to populate, i.e. **Hours at Setting** or **Funded Hours**, then enter the number of hours that is applicable to the majority of pupils.

This number is then entered automatically for the remaining pupils.

- d. Click to the right of the grid to deselect all.
- e. Edit the entry for each pupil who is receiving a different number of hours. This is achieved by highlighting the required pupil, clicking in the associated **Hours at Setting** or **Funded Hours** cell as applicable, then entering the required number.
- Click the Save button. If there are any pupils for whom zero hours have been recorded, a message is displayed. Click the Yes button to save the data or the No button to return to the Update Hours page, where the number of hours can be entered.
- 7. Click the **OK** button to return to the **Census Return Details** page, where the updated hours are displayed.

IMPORTANT NOTES:

If, while completing the return, any of the following processes are performed, click the **Recalculate** *button (located at 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 <i>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.
- 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.
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Updating Pupils 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 pupils.

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

If the pupils 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.

Edit Surrame Forexame YTI Reg		
	SEN	Everin
Aaron Aaron Chris 6 60H		No
Devies Davies Ben 4 4ES		No
Denter Dexter Betheny 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, must be done via the **Edit** button.

1. Click the **Edit** button to display the **Update Pupils with Top-up Funding** dialog. The pupils currently recorded as having top-up funding are displayed in the **Top-up Funding** list (located in the bottom half of the page).

	0	_					
erm	Summer 2017	 Students Or 	r-Roll on Census Day	/			
urname		Forename		ITY	All	 Reg 	41 -
referred urname		SEN	dayo -	 Ever in care at this school 		•	Q Search
op-up Fu	nding			Carros			
		(ij) Add		Remove			
op-up Fu		Preferred Sumame	Forename	ITY	Reg	SEN	Ever in Care
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Sumar	10	Preferred Sumame	Forename	ITY		SEN	

2. Use the **Students On-Roll on Census Day** search criteria to locate the additional pupils you wish to record as having top-up funding.

TIP: Click the **Search** button to display a list of pupils who have not been defined as having top-up funding. Alternatively, enter all or part of the required search criteria then click the **Search** button.

	me white	Forename		YTI	All	 Reg 	4II 👻
Prefer Suma	me	SEN	• cynho	Ever in care at this school	<any></any>	•	Q. Search
Su	mame	Preferred Sumame	Forename	YTI	Reg	SEN	Ever in Care
Wh	ite	White	Aurora	4	4SL		No
\v/h	ritehead	Whitehead	William	R	ELM		No
\v/h	itemore	Whitemore	Amie	2	2JB		No

 Highlight the pupil(s) who you want to record as having top-up funding then click the Add button to move the selected pupil(s) to the Top-up Funding list.

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

Surname Preferred Sumame Forename YTI Reg SEN Ever in Care Whitehead Whitehead William R ELM No	Surname Preferred Surname Forename YTI Reg SEN Ever in I Whitehead William R ELM No
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Dexter Dethany 3 3CB No White Aurora 4 4SL No	
White Murora 4 4SL No	
Whitemore Amie 2 2JB No	
	Whitemore Amie 2 2JB No
	Whitemore Ame 2 2JB No

- 4. To remove a pupil from the **Top-up Funding** list, highlight the required pupil then click the **Remove** button. The pupil's record is moved to the **Students On-Roll on Census Day** list, from where it can be reselected, if required.
- 5. Click the **Update** button to save the data and arrange the list of pupils in **Surname** order.
- 6. Click the **OK** button (located at the bottom right-hand side of the screen) to return to the **Census Return Details** page, where the updated information is displayed in the **Top-up Funding** panel.



Additional Resources:

Preparing for the School Census Summer 2017 Return handbook

More Information:

Top-up Funding Report on page 28

Editing Pupils Post Looked After Arrangements

The Post Looked After Arrangements routine provides schools with the ability to record whether pupils 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 pupils 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 pupils who already have a PLAA status are displayed.

		Edit				L.	Recalculate
urrame	Preferred Sumarie	Forename	YTI	Reg	Everie C.	Post Looked After Arrangements	
air.	Cain	Wilsen.	R	ELM.	Yes	Ceased to be looked after through Adoption	
rankän	Franklin	Ethen	2	218	Yes	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, must be done via the **Edit** button.

2. Click the **Edit** button to display the **Update Pupils Post Looked After Arrangements** page. Any pupils currently recorded as having PLAA are displayed in the **Post Looked After Arrangements** list (located in the bottom half of the page).

Sumame				foll on Census D	ay						
		Foren	ame [Y	ri -	41	•			
Preferred Surname		Reg		All		ver in Care this school	cAnyo	٠	Q s	earch	
Post Look	ed After Arrangements		Add		X R	move					
Post Look Sumer	ne Preferred Sumame		YTI Re			move	ements			Evidence Obtained	
Sumar Cain				M Yes	Post Looke Ceased to t		r through Ad		uardianship	Evidence Obtained	

3. Use the **Students On-Roll on Census Day** search criteria to locate the additional pupils you wish to record as having PLAA.

TIP: Click the **Search** button to display a list of pupils who have not been defined as having PLAA. Alternatively, enter all or part of the required search criteria then click the **Search** button.

Sumame	sm	Forenam	e	YTI	All -	
Preferred Sumame		Reg	All -	Ever in Care at this school	cAnyo 🔻	Q Search
Sumar	ne	Preferred Surname	Forename	YTI	Reg	Ever in Care
Smith		Smith	Alex	6	6VC	No
Smith		Smith	Ату	6	GIOH	No
Smith		Smith	Erin	1	PINE	No
Smith		Smith	Laura	6	6VC	No
Smyth		Smyth	Cheryl	3	3TO	No
Smyth		Smyth	Jonathan	3	3CB	No
Smyth		Smyth	Rhianna	3	3CB	No
Smyth	ye	Smythye	Vincent	4	4SL	No
_						

4. Highlight the pupils who you want to record as having PLAA then click the **Add** button to move the selected pupils automatically to the **Post Looked After Arrangements** list.

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

Franklin F	Cain Franklin	William	R	ELM.	Yes	Ceased to be looked after through Adoption	10
	Franklin	-					100
		Ethan	2	2JB	Yes	Ceased to be looked after through a Special Guardianship Or	
Smith S	Smith	Amy	6	бКН	No		
Smyth S	Smyth	Jonathan	3	308	No	Ceased to be looked after through Adoption Ceased to be looked after through a Special Guardianship Ordi Ceased to be looked after through a Residence Order (RO) Ceased to be looked after through a Child Amargement Order (

- 5. For each pupil added to the **Post Looked After Arrangements** list, 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.

- To remove a name from the list, highlight it then click the **Remove** button. The record is moved to the **Students On-Roll on Census Day** list, from where it can be reselected, if required.
- 8. Click the **Update** button to save the information and arrange the list of pupils in surname order.

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

- 9. Click the **OK** button to continue.
- 10. 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 Summer 2017 Return handbook



More Information:

Post Looked After Arrangements Report on page 28

04 Creating and Validating the Summer Return

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Creating and Validating a School Census Return

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

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

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

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

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

Validation Process	Validation Process
The Create and Validate routine is currently taking place. This may take some time.	Data is being collected
Please wait	Please wait
Validation Process	Validation Process
XML is being created	Validation rules are being applied
Please wait	Please wait

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.

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		lines Seres			
34	den Se			Enter Student Name, 200 (YYYY-MM-00) or UPW for student filter	
fi-	to Sear	ah 441	 Total of displayed room 10. To result in an error, slich in row to maripate to the 	relevant screen	
. 5	100			Location	Selder
		1500	after missing.	Name, Abraham, Janei Oate of Birth, 2005-05-15, FernaletUPH	IF Go to Focus I Student I Student Details and add or issue a UPM.
		1500	d'h nissing.	Name Floid, Rosiel Date-of Birth: 2009-03-07, Female/URM	# Go to Focus I Student I Student Details and add or issue a UPN.
		1880	Pupils agent if and over Language mining or invalid.	Name Henderson, Justi Date of Brits 2010-08-07, Nate JPN1 4022299971028	2 Ge to Posse Budeni Budeni Detalla Bilvricitudiani panel antimise Fini language.
		2080	Insufficient Address Information provided.	Name Bana, Kirk Date of Birth. 2020-07-18, Mate/3PR. H820202108013	2 Ga is Fernal/Radeol/Radeol Details Addresses and edit papific address
	G.	16010	Pease Deals: Papil's age is out of sarge for school type.	Name Tungal, Staniel Cale of Bells 2023-CI-28, Female, Apr. 121, Ph. 802020270008	If Go to Posses I Student I Student Details and write pupil's date of limits.
	q.	16200	Please-check: duplicate pupil records with the same Survaires. Forestame, Gender and Date of birth.	Name Services, Hugel Date of Setts 2010-02-03, Materia/HS	If Go to FecualStudentStudent details and check for duplicate-pupil record.
	a	16200	Please-check: duplicate pupil records with the same Surrame. Forestame. Gender and Date of birth.	Name, Services, Hugel Date of Seth 2010-02-03, MaretuPHt VE232007-4008	If Gots FeculdStudentStudent details and check for duplicate-pupil record.
	a.	23850	Pesse-check: Pupil record with rouddress details.	Name Salinaki, Cylol Date of Seth 2010-10-14, Femalet/DPR C32229014005	#Gots Fecula StudentStudent Details Addresses and with pupils address
	a.	2599	Please-check: sessione possible should notice greater than 150	Name: Aanon, Liz: Date of Birth: 2005-09-01, Famale/UPN: JI222201/0002	# Goto Fecual Atlandaros Gasson Manitol I Diadas Marks and sheck the atlandaros mark
	Q.	25299	Please check sessions possible should notice greater than '80	Name Aanon, Sophiai Date of Birth 2005-05-07, Female/UP% MI20200705004	# Go to Peccel Atlandaroe Gasson Manitol Diades Harks and check the atlandaros mark

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

To assist in the resolution of any errors and queries:

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

•	Paperi				2 Dear
Vel.	in the later of	Inter Serve	ey Return Validation - 'B. Validation rules failed (Brown - 4) Queries - 0.		
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6	ing Seat	441	 Total of stiglaged scars: 10 To resolve an error, dick in some manipum to the 	Hereitacien	
1	Type		Nessage	Location	Infator
	F.	600	(Pkinising	Hame Adraham, Janei Date of Birth 2005-05-15 /Temakel/JPK	# Certo-Focue I Student I Student Details and add/or lasue a UPM.
17		800	UPC missing	Name Rold, Rosel Date of Birth 2008-01-07, Pernale/UPN	# Conto-Fronze I Student I Student Datalis and add or issue a UPN.
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1		2.60	Insufficient Address Information pro-filed.	Name, State, NYK, Date-of Sett, 2005-01-11, Maint/Pht, WE3020102010 # Date In Presid	Studies (Studies) Details (Herica's allocal paratianal enter First language.
	9	1010	Rease Direck: Pupil's spalls out of segarity school tupe.	Name: Surgal, Stalani Jate of Birth. 200-05-25, Female, Age. 12UPH: 80200018088	# Gritts-Focus I Student / Student Details and enter pupil's date-of birth.
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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. Enter all or part of a UPN, pupil'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.

0	lepori					資 Date
		inter Same				
5.4	ent Seo	nh ann		Sec. 1	Ster Student Name, DOS (YYYY-MRLDD) or UPV/Ior student Mar	
	Seed		Pre NECCOMPTERS Name: Smith. Exis. Date of Garth. 2018-03-27. Fearmine Pre. UEXCOMPTERS: Name: Smith. Size. Date of Bark. 2018-08-12. Nate	parents the	New Strategy	
Tre	• 5	inquence (i	Pik BE202010908. Name Smith. Amy. Date of Beth: 2005-03-02. Female		Lexator	Solution
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		100	Pit: EEE000107628. Name: Smith. Trinity. East of Birth: 2000-12-11. Familie Pite EEE0001077028. Name: Emile. Daniel. Cale of Birth: 2004-02-07. Male		Name Parts, Russiel Date of Both. 2020-20-07. Prevale(UPN	E Conter Frenze Blackeri Blackeri Delado and add or instance BPR.
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		111 A	Occurs that's Antonia south with the same formant. Departure, function and frame	and birth	Name Resolution Accord Free of Kink, Mich. 40, 41 March 400	If fore for all behavior for data batch and chark for Audio an easily acced

 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 are displayed in the Student Search field. Click the Find button to display all errors and queries relating to that pupil.

-	Paperi				¥ Door
		Dense Summe			
- 58	ubert Se	int life	Name: Abraham, Jane, Date of Bethy 2005-85-16, Aanala	Sine-Student Name, DOB (11111-489-50) or UPItritor student filter	
ĥ.	tor Seam	8 541	 Total of single periods are 2. To resolve an error, dick in non-to-marigane to the 	NR-ST-SORE	
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		192	2Pt many.	Name, Headway, Land Date of Bolk, 2020-05-10, Fernated, PM	If Som Pouse I Buderil: Buderil Details and edit or issue & 2PR
	9	26360	Passe check sessions possible shuid not be presis than 150	Name, Abraham, Janel Date of Birth: 2015-15-19, Famalal (Ph)	# Sole Prove Atlantance Gassor Nonito's Diaglay Marks and chack the atlantance marks

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

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 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.

0	Paper					20 Dame
Val-	-	laure 1	-	Return Validated - 12 Validation value field (Simon - 4, Supri-	ex-0 Multima Gree Student Name, DOD (1999) 484-301 or URIVIX student Nam	
- 10	and the second			Total of displayed uses: 10 To resolve an error, slich in surface		
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		-	10010	will and overlanguage maxing or levels.	Name Newbook, Jacki Date of Brits, 2010-05-07, Nata UVB, M22220074223	If De & Focus I Muderil Diuberi Delahi Mess/suburit prestand online Food language.
	4	2.60	12000	t Address information provided.	Name: Bana, Hint Case-priority 2005-01-15, MakeURN, WE2020108012	If Ge toFocurtStudentOkudert Details Addresses andresh pupit's address
	9	-	2000.0	heck: Pupil's again out of range for achool type.	Name: Surgal, Skaletal Sate of Birth: 2005-05-28, Famale, Age: 120/PH: 802020118088	
	9	1000	Plas	ase check disploate pupil records with the same Sumaria, Poranama, Sander and S	late of North Name Bancison, Hugo Date of Both 2010-02-03, Hala(J.Phr.	of Gorie Procee/Student/Student details and check for duplicate pupil record.
_	_	Witten	iller.	and the high states of second with the same however. For each final sector	Interest States, Name Reporting, Name Party of State, 2010; 2010; 2010; 2010; 2011; 2010;	I finds from a fits deal fits deal dealer and classic fits it when and around

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 at the left-hand side and directly above the **Validation Errors Summary** panel). The report is displayed in your web browser, e.g. Internet Explorer[®], where it can be printed or transferred to another application, if required (please see *Transferring Report Data to a Spreadsheet* on page *30*).

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

<LACode><SchoolNumber>_<SurveyType>_<LACode><LL><Year>_ <SerialNumber>_ValidationErrorsSummary.HTML), is also stored in this folder.

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

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.

26 Producing the School Census Summer 2017 Return (English Nursery Schools) handbook, applicable to 7.174 onwards Many of the errors generated can be fixed quickly using bulk update functionality (via **Routines | Pupil | 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.

1

More Information:

Transferring Report Data to a Spreadsheet on page 30

Producing Detail Reports

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

Each detail report header displays the **Security Message** that was defined in the **Census Return** browser, the **Report Criteria** and the **Total Pupils** 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: Pupils on-roll on census day.

This report provides the following basic information about pupils who are on-roll on census day: UPN, legal surname, legal forename, preferred surname, former surname, date of birth (DOB), gender, year taught in (YTI), date of admission, enrolment status, part-time status, boarder status, Hours at Setting and Funded Hours.

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

SEN Report

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

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

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

Address Details Report

Report Criteria: Pupils on-roll on census day.

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

Definition:

Unique Property Reference Number (UPRN) - a unique identifier (reference number) that links together related address records across different software programmes. This enables organisations to collate and share information based on a common reference number.

Free School Meal Eligibility Report

Report Criteria: On-roll pupils on census day who were eligible for free school meals on or after 20/01/2017 and up to and including census day.

This report provides information on free school meal eligibility for pupils 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.

Top-up Funding Report

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

The report provides the following information about pupils 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).

Generating Detail Reports

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

See State #	Deste & Validate 🔲 Summary 🖏 Authorize 🔡	DetailReport ·	
Census Details 2 Schoo	I Information 3 Hours for Early Years 4 Top-u	On Roll Basic Details Report SEN Report	
1 Census Details Census Date	18/05/2017	Address Details Report Free School Meal Eligibility Report	Salculate All Cetails
Description	School Census Summer 2017	Top-up Funding Report	
FSM collected from	20/01/2017 FSM collected to	Post Looked After Avergements Report	
2 School Information		Multiple Reports	
School Name	WATER BABIES NURSERY SCHOOL		
14.1	Setting Catching and Day	ther 1940	

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

Ms Detail Reports	? ×
On Roll Basic Details Report	
SEN Report	
Address Details Report	
✓ Free School Meal Eligibility Report	
☑ Top-up Funding Report	
Post Looked After Arrangements Report	
Report	Cancel

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

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

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

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

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

For example:

8201050 SC2 823LL17 001 onroll basic details report.html.

More Information:

Configuring the Census Folder on page 10 *Transferring Report Data to a Spreadsheet* on page 30

Printing a Report from your Web Browser

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

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

Transferring Report Data to a Spreadsheet

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

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

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

Deleting Temporary Web Browser Files

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

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

Deleting the cache in 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 Internet Explorer 8 and 9

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

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

6. Click the **OK** button.

Producing the Summary Report

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

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

Generating the Summary Report

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

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

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

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

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

For example: 8201050_SC2_820LL17_001_Summary_Report.html.

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



More Information:

Configuring the Census Folder on page 10 Generating Detail Reports on page 29 Transferring Report Data to a Spreadsheet on page 30 Authorising the Return on page 33 Deleting an Unauthorised Return on page 37

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 10 Specifying the Security Message for Reports on page 11 Resolving Validation Errors and Checking Queries on page 24 Producing Detail Reports on page 27 Producing the Summary Report on page 31

Authorising the Return

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

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

1. Click the **Authorise** button.

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

SIMS .net	
?	Return cannot be edited once authorised. Do you want to continue?
	Yes No

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

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

s Head teacher authorisation	×
Authorisation provides an XML Return file for upload to your LA/DfE.	
Please confirm that the head teacher is satisfied that the Summary and Detail Reports	
have been checked for accuracy and completeness.	
I, User two, 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 the LA/DfE.	
Additional text to be displayed on the authorisation report	
Continue	Cancel

3. Enter any additional text to be displayed on the authorisation report, if required. This may be requested by your LA, e.g. to explain the reason for any validation failures.

 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 have a calculated the Continue button is activated.

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

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

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

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

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

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

After the return is authorised, reports based on cohorts can be created (via **Reports | Design Reports**), so that items collected in the return 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:

Creating a New School Census Return on page 9 Producing the Summary Report on page 31 Retrieving Authorised Census Return Files on page 35 Copying a Return on page 37

Submitting the Return

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

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

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



More Information:

Configuring the Census Folder on page 10 *Copying a Return* on page 37

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 the Browse For Folder dialog. Navigate to the location of the required folder then highlight it. If a suitable folder does not exist, click the Make New Folder button then enter a suitable folder name.

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

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

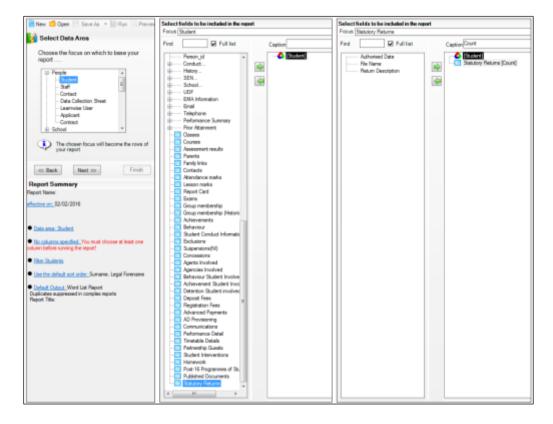
b. Click the OK button to select or create the folder then return to the Retrieve Authorised Return Files for <census name> page where the chosen folder name is displayed in the Download to field. 4. Highlight the return you wish to retrieve then click the **Retrieve Files** button.

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

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

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

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





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 <u>not</u> 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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40 Producing the School Census Summer 2017 Return (English Nursery Schools) handbook, applicable to 7.174 onwards



Contact the Service Desk today on 0345 222 1551 • Option 3

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