

Applicable to 7.174 onwards

Producing the School Census Summer 2017 Return (English Secondary/ Middle deemed Secondary Schools) handbook



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Overview

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

A list of items collected from Secondary/Middle deemed Secondary schools in England for the School Census 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 | Student | Student 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

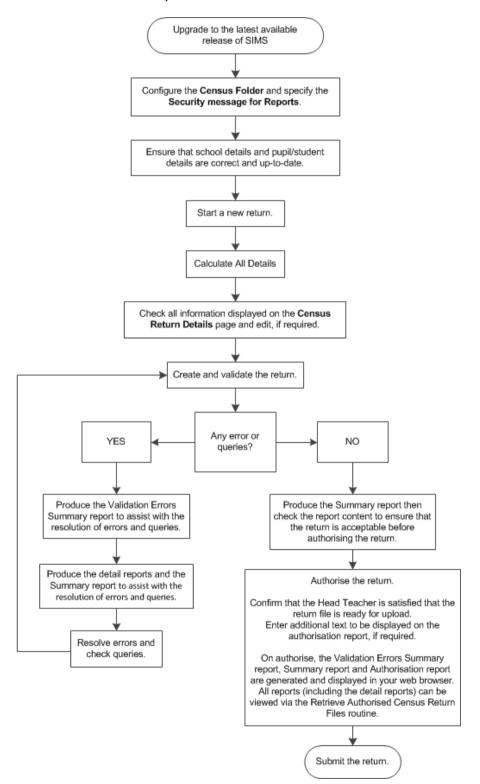
Data Items Removed from the Summer Return

Focus | Student | Student Details - Welfare panel

In Care is no longer collected in the Summer return.

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. 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 <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 student level information is present and accurate in SIMS. For example, ensure that school details are correct, all new students have been added to SIMS, all leavers have been recorded and where applicable all exclusions have been recorded, etc.

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

Student Level

- Student Identifiers:
 - unique pupil number (UPN) and former UPN, unique learner number (ULN)
 - surname, forename, middle names, former surname, preferred surname
 - date of birth and gender.
- Student Characteristics:
 - nationality, country of birth, language code
 - free school meal eligibility start date, end date and UK country in which the eligibility applies
 - funded hour and hours at setting (applicable to schools with students of the applicable age), top-up funding indicator
 - post looked after arrangements, Youth Support Services Agreement (YSSA) indicator and Learner Support code.
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- Status: enrolment status, date of entry, date of leaving, part-time indicator, boarder indicator and actual national curriculum year group.
- Special Educational Needs: SEN Provision.
- Termly Exclusion Information (01/09/2016 to 31/12/2016): exclusion category, reason for exclusion, SEN provision (formerly stage), exclusion start date and actual number of sessions excluded from.
- Home Information: Student's home address, including post code and unique property reference number (UPRN).
- Termly Attendance Information (01/01/2017 to 16/04/2017): Possible Sessions, sessions missed due to authorised absence, sessions missed due to unauthorised absence, attendance codes and number of sessions missed.

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. This, 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 student and school information is present and accurate in SIMS.

The School Census Summer 2017 Return collects data for:

- all students on the register on census day (18/05/2017).
- any additional students <u>not</u> on-roll on census day who:
 - had an exclusion that started between 01/09/2016 and 31/12/2016.
 - were on-roll for at least one session during the collection period from 01/01/2017 and 16/04/2017.
 - were awarded Learner Support funding from 01/08/2016 to 18/05/2017.

It is possible to create more than one return. This enables 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.

- 0			ious 📄 Copy	🕑 Help 💃 Close
Term Sur	mmer 2017 -	Census Folder	C:\StatutoryReturns\School Census	
	essage for Reports contains sensitive information.			Default Message
Description		File Name	Census Date Date Created Validated	Authorized Date

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 configured and that the required Security message for Reports is specified as described in the following sections.

More Information:

Deleting an Unauthorised Return on page 44 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 For Folder	
Make New Folder	OK Cancel

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 <u>read-only</u> information:

- Census Date: 18/05/2017
- Attendance data collected from 01/01/2017 to 16/04/2017
- Exclusions data collected from 01/09/2016 to 31/12/2016
- FSM (Free School Meal) data collected from 20/01/2017 to 18/05/2017
- Learner Support data collected from 01/08/2016 to 18/05/2017.

Census Details				
Census Data	18/05/2017			So Calculate All Details
Description	School Census Su	nmer 2017		
Attendance collected from	01/01/2017	Attendance collected to	16/04/2017	
Exclusions collected from	01/05/2016	Exclusions collected to	01/12/2016	
FSR collected from	20/01/2017	FSM collected to	18/05/2017	
Learner Support collected from	01/06/2016	Learner Support 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.

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

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

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

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

Editing School Information

The **School Information** panel displays details that have previously been recorded on the **School Details** page in SIMS (**Focus | 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	Green Abbey School			
LA	823	Establishment Number	1132	
Telephone	851234			
School E-mail Address	office@ga.org.uk			
School Phase	AT All Through			
School Type	Comprehensive all-through	h 11-18		
Governance	Community	Intake Type	Comprehensive	
Lowest NC Year	7	Highest NC Year	13	
			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.

chool Details - Green Abbey Sch	ool				
Save 🕘 Undo				() H	telp
Establishment 2 Address 3 Co	ntact Details 4 Sites 5 Documents	s 6 Childcare			1
1 Establishment					1
School Name	Green Abbey School			0	
LA	823 Central Bedfordshire		358	×	
Establishment Number	4321		and the	1000	
Unique Reference Number		2			
UK Provider Reference Number			Custon S S		
School Phase	Secondary		m of		
School Type	Concretiensive al-through 11-18	-			
School Governance	Community	-		3	
Intake Type	Comprehensive	•			
Previous School Name		Date Name Changed			
Previous Estab Number		Date Number Changed			
Previous URN Number		Date Number Changed		12	
Boarding Pupils	Nursery Class	Special Class or Unit			
		-0.000			
Head Teacher	Mr Adrian Blacker	Main Contact	Mr Adrian Blacker		-

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**.
- Click the Save button then click the OK button to return to the Census Return Details page, where the updated details are displayed.
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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	All schools (excluding Nursery schools) – National Curriculum Year groups E1, E2, N1 and N2 only. NOTE: No longer applies to Reception (R).	15 hours

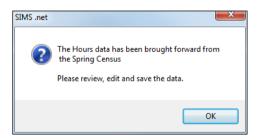
The required data can be recorded via the **Edit** button in the **Early Years** panel or via the **Update Early Years** page (**Tools | Statutory Returns Tools | Early Years**).

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

Early Years											6	
	1	P Edit									l	Recalculate
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	N1	N1 AM	2	3	3	15	15		
Adams.Sadie	20/03/2013	Female	001521	N2	АМ	3	3	4	15	15		
Alyona, Tatyana	21/12/2012	Female	001522	N2	PM	3	4	4	15	15		
Andrews Richard	02/12/2012	Hale	001523	N2	AM	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	АМ	3	4	4	15	15		
Davies Adam	01/12/2012	Male	001526	N2	AM	3	4	4	15	15	w	

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.



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											
		upils View									
ensus Term Summer 2017 💌			All		YT1	Al v	Reg A		 Status 	41	
em summer zonn •		Age at 31/08/2016	-				neg n		Janua	-	
upës											
Name	Date of Birt	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	1	5 1	
Adams, Sadie	20/03/2013	Female	001521	N2	AN	3	3	4	1	5 1	5
Alyona, Tatyana	21/12/2012	Female	001522	N2	PM	3	4	4	1	5 1	s
Andrews, Richard	02/12/2012	Male	001523	N2	AM	3	4	4	1	5 1	5
Bronislaw, Tomaz	06/04/2013	Male	001524	N2	PM	3	3	3	1	5 1	5
Clarke Harriette	09/11/2012	Female	001525	N2	АМ	3	4	4	1	5 1	5
Davies Adam	01/12/2012	Male	001526	N2	AM	3	4	4	1	5 1	5
Delanve,Millicent	10/02/2014	Female	001583	N1	N1 PM	2	2	3	1	5 1	5
Elliott.Josef	15/02/2013	Male	001527	N2	PM	3	3	4	1	5 1	5
Ellis,Paul	08/02/2014	Male	001584	N1	N1 PM	2	2	3	1	5 1	5
Erikson, Finley	23/12/2012	Male	001528	N2	АМ	3	4	4	1	5 1	5
Gilbey,Clarissa	10/04/2013	Female	001529	N2	AN	3	3	3	1	5 1	5
Gorev,Edgar	20/05/2013	Male	001530	N2	AM	3	3	3	1	5 1	5
Haddon, Magdalene	21/02/2013	Female	001531	N2	AM	3	3	4	1	5 1	5
Hellerton,Brooke	10/03/2013	Female	001532	N2	PM	3	3	4	1	5 1	5
Jones, Daniel	16/11/2012	Male	001533	N2	PM	3	4	4	1	5 1	5
Kaur,Aafia	04/04/2014	Female	001585	N1	N1 PM	2	2	2	1	5 1	5
Lin, Jian	22/01/2014	Male	001586	N1	N1 PM	2	2	3	1	5 1	5
Lowes.Ching	01/02/2013	Male	001534	N2	PM	3	3	4	1	5 1	5 -

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	41 -	Reg 4		Status	41	•
upils											
Name	Date of Bir	th 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	N1 AM	2	3	3	15	15	
Adams,Sadie	20/03/2013	Female	001521	N2	АМ	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	N2	АМ	3	4	4	15	15	
Bronislaw,Tomaz	05/04/2013	Male	001524	N2	PM	3	3	3	15	15	
Clarke.Harriette	09/11/2012	Female	001525	N2	ΑМ	3	4	4	15	15	÷
Device Adver	05/02/20042	Mala	004536	100	1.8.4	0	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.
- 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.

Updating Students with Top-Up Funding

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

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

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

	2 €62.					💿 Re	calculate
Sumane	Preferred Sumame	Forename	YTI	Reg	SEN	Ever in	
Abbess	Abbean	Graham	9	9A	E	No	
Bristol	Bristol	Andrew	11	11C		Yes	
Inhibing	Whiting	Kellyann	11	11E		No	

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

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

Sumarne	SEN	cAayo 🔻	YTI Ever in care at this school	All	• Reg	All 🔻	
Preferred Surname	SEN	cAnyo 💌	Ever in care at this school	cAnyo			
					•	Q Search	
Top-up Funding	ili Add		Remove				
				Dag	CEM	Ever in Care	
Top-up Funding Surname Abbess	nije Add Preferred Surname JAbbess	Forename Graham	ΥΠ	Reg 9A	SEN	Ever in Care	
Sumame	Preferred Surname	Forename		Reg 9A 11C	SEN E		
Abbess	Preferred Surname Abbess	Forename	YTI 9	9A		No	

18 Producing the School Census Summer 2017 Return (English Secondary/Middle deemed Secondary Schools) handbook, applicable to 7.174 2. Use the **Students On-Roll on Census Day** search criteria to locate the additional students you wish to record as having top-up funding.

TIP: Click the **Search** button to display a list of students 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.

mame eferred mame			Forename SEN	<any></any>	•	YTI Ever in care at this school	8 <any></any>	• Reg	All	
Suman	ie i	Preferr	ed Sumarne	Forenam	e	YTI	Reg	SEN	Ever in Care	
Smith		Smith		Daniel		8	8E	E	No	
Smith		Smith		Jade		8	8A		No	
Smith		Smith		Osias		8	8A		No	
Smith		Smith		Stephani		8	8A		No	
Smith		Smith		Trinity		8	8E		Yes	
Smith		Smith		Trinity		8	8A	к	No	h l

Highlight the student(s) who you want to record as having top-up funding then click the Add button to move the selected student(s) to the Top-up Funding list.
 One or more students can be selected using the Ctrl+click or Shift+click functionality.

sumame Preferred Sumame Forename YTI Reg SEN Ever in Care	umame	smith	Forename		YTI	В	 Reg 	All •	•
Smith Smith Jade 8 8A No Smith Smith Osias 8 8A No Smith Smith Stephanie 8 8A No Smith Smith Stephanie 8 8A No Smith Smith Stephanie 8 8A No Smith Smith Tristan 8 8A No Smith Add E No No Smith Sumame Preferred Sumame Forename YT Reg SEN Ever in Care Abbess Abbess Graham 9 9A E No Bristol Andrew 11 11C Yes Yes Whiting Whiting	referred urname		SEN	<any> •</any>		<any></any>	•	Q Search	
Smith Smith Osias 8 8A No Smith Smith Stephanie 8 8A No Smith Smith Smith Stephanie 8 8A No Smith Smith Tristan 8 8A No Smith Smith Tristan 8 8A No xp-up Funding Image: Second Seco	Suman	ne	Preferred Sumame	Forename	YTI	Reg	SEN	Ever in Care	
Smith Smith Stephanie 8 8A No Smith Smith Tristan 8 8A No Ap-up Funding Add Xmax Remove Sumame Preferred Sumame Forename Forename YTI Reg SEN Ever in Care Abbess Graham 9 9A E No Pristol Bristol Andrew 11 11C Yes Whiting Whiting Kellyenn 11 111E No Smith Daniel 8 8C E No	Smith			Jade	8				
Smith Smith Tristan 8 8A No Smith Tristan 8 8A No Sp-up Funding Add Remove Sumame Preferred Sumame Forename YTI Reg SEN Ever in Care Abbess Addeess Graham 9 9A E No Bristol Bristol Andrew 11 11C Yes Whiting Whiting Kellyern 11 11E No Smith Smith Daniel 8 8C E No	Smith								
Add <u>Freferred Sumame</u> Forename YTI Reg SEN Ever in Care Abbess Abbess Graham 9 SA E No Bristol Bristol Andrew 11 11C Yes Whiting Whiting Kellyenn 11 11E No Smith Smith Daniel 8 8C E No					-				
Sumame Preferred Sumame Forename YTI Reg SEN Ever in Care Abbess Abbess Graham 9 9A E No Bristol Bristol Andrew 11 11C Yes Whiting Whiting Kellyerin 11 11E No Smith Smith Daniel 8 8C E No	Smith		Smith	Tristan	8	AB		No	
Abbess Abbess Graham 9 9A E No Bristol Bristol Andrew 11 11C Yes Whiting Whiting Kellyann 11 11E No Smith Smith Daniel 8 8C E No	10-10 Fi	ndina	100-044		Densus	1			
Bristol Andrew 11 11C Yes Whiting Whiting Kellyann 11 11E No Smith Smith Daniel 8 8C E No]			
Whiting Weilyann 11 11E No Smith Smith Daniel 8 8C E No	Suman	ne	Preferred Sumame	Forename	YTI				
Smith Smith Daniel 8 8C E No	Suman	ne s	Preferred Sumame Abbess	Forename Graham	YTI 9	9A.		No	
	Suman Abbese Bristol	ne s	Preferred Sumame Abbess Bristol	Forename Graham Andrew	9 11	9A 11C		No Yes	
	Suman Abbese Bristol Whiting	ne s	Preferred Sumame Abbess Bristol Whiting	Forename Graham Andrew Kellyann	YTI 9 11 11	9A 11C 11E	E	No Yes No	
	Suman Abbese Bristol Whiting Smith	ne s	Preferred Sumame Abbess Bristol Whiting Smith	Forename Graham Andrew Kellyann Daniel	YTI 9 11 11 8	9A 11C 11E 8C	E	No Yes No No	
	Suman Abbese Bristol Whiting Smith	ne s	Preferred Sumame Abbess Bristol Whiting Smith	Forename Graham Andrew Kellyann Daniel	YTI 9 11 11 8	9A 11C 11E 8C	E	No Yes No No	
	Suman Abbess Bristol Whiting Smith	ne s	Preferred Sumame Abbess Bristol Whiting Smith	Forename Graham Andrew Kellyann Daniel	YTI 9 11 11 8	9A 11C 11E 8C	E	No Yes No No	

- To remove a student from the **Top-up Funding** list, highlight the required student then click the **Remove** button. The student'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 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 Autumn 2017 Return handbook

Editing Students Post Looked After Arrangements

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

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

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

Post Looked Aft		Edit				6	Recalculate
Sumarra	Preferred Sumarne	Loss .	YTI	Rep	Ever in C.,	Post Looked After Arrangements	1
De Souze	De Sours	Luciano	12			Ceased to be looked after through Adoption	
Noble	Noble	Natasha	12		No	Ceased to be looked after through a Special Guardianship Order (SGO)	
1							•

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

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

										ica - 🥹 Help 💥 (
erm	Summer 2017	. Stude	ents On	-Roll on	Census Day	r				
umame		Forena	me			YTI	All			
referred		Reg		41	•	Ever in Care at this school	cAnyo	•	Q Search	
ost Looke	d After Arrangements	1	Add			Remove				
ost Looke Sumam		Forename		Reg E		Remove Post Looked After Arran	gements			Evidence Obtained
Suman								doption		Evidence Obtained

3. Use the search criteria to locate the additional students you wish to record as having PLAA.

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

rname s sferred mame	Forename Reg	d All	YTI Ever in Care at this school	13 • cAnys •	Q, Search
Sumame	Preferred Sumame	Forename	YTI	Reg	Ever in Care
Sampson	Sampson	Delilah	13		No
Smith	Smith	Devid	13		No

03| Producing the School Census Summer Return

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

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

	Sumame	Preferred Sumame	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	V
	Noble	Noble	Natasha	12		No	Ceased to be looked after through a Special Guardianship Order (SGO)	
	Sampson	Sampson	Delilah	13		No	Ceased to be looked after through a Special Guardianship Order (SGO)	2
t	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)	

- 5. For each student 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.

- 7. 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 students 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.
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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 34

Entering Attendance Information

Termly attendance data (including attendance codes and the number of sessions missed) should be provided for non-boarder students and leavers aged four to 15 inclusive on 31/08/2016, who were on-roll for at least one session during the collection period from 01/01/2017 to 16/04/2017.

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 <u>every</u> panel, with the original data stored in SIMS. Do <u>not</u> 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 <u>no</u> missing marks.

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

5 Attendance		
	Your attendance codesare DIE compliant	
	This will be rechecked at the Create & Validate stage	

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

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

- 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.
- 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 32

Are your Attendance Codes DfE Non-Compliant?

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

5 Attendance	
	Your attendance codes are not DIE compliant
	Place ded site this had a second an and the second Physics where a second
	Please deal with this lack of compliance and then press 'Check attendance codes'
	Check attendance codes

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- 1. Non-compliant codes must be dealt with. Please contact your Local Support Unit for assistance.
- 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 the

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).

		C.B. Car	nut an an	0017 10.010				
Group By	 Adend 	lance Collection	Merried (01/01	/2017-16/04/2	91/J			
Sumame	Forename	Year Taught In	Rep 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	Sebestiane			On Roll	0	0	0	
Benard	Junius			On Roll	0	0	0	
Bourdage	June			On Roll	0	0	0	
Calzone	Merlin			On Roll	0	0	0	
Catapano	Charity			On Roll	0	0	0	
Damrell	Glen			On Roll	0	0	0	
Doberer	Hilbert			On Roll	0	0	0	
Dusel	Ambrogio			On Roll	0	0	0	
Frymark	Garnett			On Roll	0	0	0	
Garcia	Salty			On Roll	0	0	0	
Gaskey	Silvano			On Roll	0	0	0	
Gaumont	Allegria			On Roll	0	0	0	

 To filter the display of students in the Attendance panel, select Year Group, Registration Group or Enrolment Status from the Group By drop-down list.

Alternatively, select **Group by None** to display a list of all students.

- 2. To sort the displayed data by surname, forename, year group, registration group or enrolment status, click the appropriate column header.
- 3. For each student, enter the correct attendance numbers in the **T Poss** Sessions, **T Auth Absences** and **T Unauth Absences** columns.
- 4. To clear the attendance information and check for additional students, click the **Check for additional students & zero totals** button.

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

04 Completing the School Census Summer Return

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Producing the Summary Report	37
Editing an Unauthorised Return	38
Authorising the Return	39
Submitting the Return	41
Retrieving Authorised Census Return Files	42
Copying a Return	43
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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 students 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 start the process. There may be a short delay, depending on the number of students at your school.

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

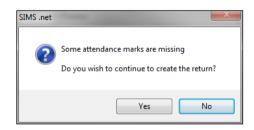
Validation Process	Validation Process
The Create and Validate routine is currently taking place. This may take some time. Please wait	Data is being collected Please wait
Validation Process	Validation Process
XML is being created Please wait	Validation rules are being applied Please wait

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

SIMS .net	
?	There are attendance codes in use which do not conform to the DfE requirements.
	Attendance code <z> must not be used</z>
	Please edit the attendance data.
	Create & Validate cannot proceed.
	ОК

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

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



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

Alternatively, click the **No** button to cancel the process, then use the Deal with Missing Marks routine (**Focus | Attendance** (or **Lesson Monitor**) | **Deal with Missing Marks**) to locate the missing marks and enter the appropriate attendance codes.

For more information, please refer to the *Managing Pupil/Student Attendance* handbook or the *Monitoring Session and Lesson Attendance* handbook.

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.

h faort X Does								
Relation Erren Semency Peter Validation - 10 Validation value tabled (Silvon - 4 Quartier - 6								
Inter Search Date: Search 2005 (VYY-444-00) or UPH to studen Han								
ny See	n 41	 Tabal of displayed rows : 'II To revolve an error, eliek in new to manipate to the 	e relievant somer					
		Nessage	Location	Solution				
- F	1500	UPH missing.	Name: Abraham, Janei Date of Onth. 2005-05-10, Femalei/JPN:	# Go to Focue I Student I Student Details and add or issue a UPN.				
	1900	UPIt maxing	Marrier, Reid, Roulet Date of Birth. 2009-03-07, Fernalet/UPM	If Go to Focus (Student) Student Details and add or issue a UPN				
	1880	Pipils aget 5 and over Language missing or invalid.	Name: Renderman, Junit Date of Bells 2010-05-07, Malej JPN 1022220011020	2 Gala Facual (Bades) (Bades) Celada (Broschalbard panel and exter First language				
F	2960	Insufficient Address Information provided.	Name: Salve, Krikl Date of Sinh: 2005-07-18, MaleUVHX H620200705012	# Go to Pocual Student Student Oxtails Addresses and edit pupil's eddress				
Q	19010	Pease Check: Pupils age is out d'rangefor school type.	Marter: Surgal, Skalene Date of State 2013-03-28, Female, Age: 1212-91: 8020281106088	# Goto Focus Student Student Details and error pupil's date of birth.				
	16200	Please check, shallooleynajil mumis with the same Sumarne, Funename, Gender and Date of Sich-	Name: Bernison, Hugel Date of Brits 2010-02-03, MaleUPN	2 Go is Proval Student/Student details and check for duplicate pupil record.				
9	16250	Please check: duplicate pupil recents with the same Sumaries. Forename, Gender and Date of birth.	Name: Bernison, Hugel Date of Birth: 2010-12-03, MaleUPH: V525299014008	# Gots Foour/Student/Student details and check for duplicate pupil record.				
	2088Q	Pease-check Pupil record with ro address details.	Name, Balinski, Cylul Date of Birth 2010-03-14, Female (JPN: C823200114005	If Go to Focust Student Student Ontails Addresses and edit pupil's address				
	25299	Please check sessions possible should not be greater than 150	Name: Aaron, List Date of Sinth. 2005-05-07, Pemalel JPN: J82030109032	4 Gots Pocus Atlandance (Lasson Monitor) Display Marks and check the atlandance marks				
9	25290	Please check associone possible should not be greater than 150	Name: Aaron. Sophiel Deal-of Birth. 2005-18-01. Famalet/PN: W020200100004	# Gots Focus Atlandance (Lesson Monitor) Display Marka and check the atlandance 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.

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.				

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

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.

	Contract of the second				24	Close	
	debalen Deurs Taenway Return Voldation - 10 Voldation - Non Admin (Deurs - 6 Gaustino - 10						
	Sudent Sa	anch	Area .	Enter Student/Kense, SOB (YYYY) (84-OE) or UPN for student/liker			
	Gron Sear	ch 411	 Total of displayed sove. "II To reach an error, click in row to navigate to the 	e referant screen			
	Type	Sequence	Message	Location	Solution		
٠		100	URLining	Name Handoor, Janet Date of Both 2020-09-10, Percele(2011	2 Sola Passa Budeni Budeni Detalis and sali or lasse a 1990		
		1500	UPM missing.	Name, Raid, Roaled Date of Birth, 2003-03-07, Fernaled PM	# Sons Focus I Student Databased peraits and add or issue a 1976.		
		-	Pupils aged Eard over Language minoing or invalid	Name Henderson, Jack Dale of Briel, 2010 OK 01, Makcilleri, KE222001 (422)	# Sole Press (Suder) (Suder) Details Etraiolishand paratiant anter First language		
		230	Insufficient Address Information provided.	Name Bans, Sol, Date of Bolt, 2020-07-18, Malej, Ph. (402000 1987) [# Early Press)	Guderi (Suderi Delah, Bheis yudhari parat ani erite Fini kespanya.		
	0	1810	Please Check: Pupil's age is out of range/or actival type.	Name Surgail Skaine Dee of Brits 200-03-38. Female Age: 121-PK 06203070008	# Sons Focus I Student Datality and error pupil's date of birth.	_	
1		And and a second		And a second sec	THE REPORT OF A DESCRIPTION OF A DESCRIP		

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

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

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

	Paport						貿 Dass	
	debides Deen Seeway Return Veldeed - 10 Velded - 10 Velde							
1.1	inter Search	di i	UNK	CELEVIER View Smith Ethn Date of Birth 2018-02-07. Fernal SECON WITHOUT Name Smith Alex, Date of Birth 2018-18-12. Hale	phild	te selevant somen		
	100	100	LPS PI	8352011/08008, Name: Smith, Amy: Date of Seth. 2015-03-02, Femal 9256821023173, Name: Smith, Laure: Date of Bells: 3008-02-19, Fem	ala .	Location Name Abraham, Lana Dass of Birth 2005-05-15, Percelat07%	Solution # Ge to Focus : Student I Student Details and add or issue a UPN.	
		700	1.9% 83	ACCOUNTINGS' Name Smith, Jusie Gaie of Birls 2000-03-02, Ferry RECOUNTINGS, Name Smith, Snink, Gaie of Birls 2003-03-01, Ferry RECOUNTINGS, Name Smith, Daniel, Date of Birls 2003-03-07, Mail	ale	Nerve Reid, Rosiel Des of Brits 2009-03-07, Fernale (1979)	4 Gr to Fecue / Sudent / Sudent Setally and edit or leave a UPN.	
		164	1.00	is aged 5 and now Language missing or invalid.		Ramon Revolutions, 2000 Date of Birth, 2010-01-01, Made(3PR, 802020801020)	2 Ga to Facua (Budent) Basteri Detain (Beischultung paret and exter Find language	
		230	140	Rolent follows information provided.			If General Society and Strategy	
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		10,000	See	an charit dedicateneoù aroute uittete sann Sennen. Evenene	Candley and Date of high-	Name Repaired March 1994, of State 2010, 2011, 2011, 2011	a Control Council Student Student Statistics and characterized in the statisticate and cancers.	

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

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Validation of	didation Encord Strengty Potent Validation -10 Validation vite failed (Encord - 1)								
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9	25200	Please-check: sessions possible should not be greater than 150	Name: Abraham, Janei Date of Birth: 2005-05-19. FemalelUPM:	# Goto Focus: Atlandance (Lesson Munitor): Display Marks and check the standance 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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Valida	tion In	-	manary .	Peters Valdeted - 10 Valdetion value failed (Drow - 4, Gamies - 6) (()) () () () () () () () () () () ()	
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	11	100	Phone-d	eexismin possible should not be greater than 150 Name. Also, Sighted Date of Brits 2005-09-011. Fernales/Phit ME2020100004 PSic to Facual -Rhendorica-(Saecor Monico): Display Marka and check the attends	ince mail

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

³⁰ Producing the School Census Summer 2017 Return (English Secondary/Middle deemed Secondary Schools) handbook, applicable to 7.174

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

	C Pape	ri -					2	Close
v	1000	a line	. lere	wy.	Parkers Validation - 10 Validation rules failed (Brown - 6, Queries - 6)			
	Subert 3	Search 1			M ¹ rel	Enter Student/Name. 008 (YYYY-984-0E) or UPS for student/liter		
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۴	F.	-	9.0	NGS-	ed.	Name: Abraham, Janel Date of Birth 2005-05-15, Fernale10/%.	# On to Force I Dudent I Student Details and add or leave a UPH.	
Г		100	1500			Name: Rold, Roaled Date of Birth 2028-23-27, Female/3979;	4 Grote Force / Sudent Student Setals and abl or losse a UPN.	
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Ľ		159	1620	3	t. Address information, provided.	Name: Baine, Gold Date of Binth, 2005-01-10, Name UPA: H020200100112	# GrittinFocustRudentStudentDetails.Addresses and edit pupil's address	
Ľ	0	1011	0,2820	2	wolk. Phapilita age is out of range for school tuge.	Name: Sungali, Skaleni Date of Sinth 2013-03-38, Namale, Age: 120-PH 5505001 18585	# On to Forue I Student I Student Details and enter propil's date of birth.	
Г	0	103	9	Passed	well-staplicate pupil recents with the same Sumane, Porename, Gander and Date of birth	Name Bension, Hugel Date of Sinh. 2010-02-05. MaleUPN	4 Gris Pseud Sudent/Student details and check for staplicate pupil record.	
1				-				

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 *36*).

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.

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

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



More Information:

Transferring Report Data to a Spreadsheet on page 36

Producing Detail Reports

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

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

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

The following reports are currently available:

On-Roll Basic Details Report

Report Criteria: Students on-roll on census day.

Where applicable, this report provides the following information about students who are on-roll on census day: 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, language, nationality, country of birth, Youth Support Services Agreement (YSSA) status, part-time status, boarder indicator.

NOTE: Where a student 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.

Leavers Basic Details Report

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

- Leavers with attendance 1 term ago (01/01/2017 to 16/04/2017)
- Leavers with exclusions 2 terms ago (01/09/2016 to 31/12/2016)
- Leavers with learner support of Vulnerable Group Bursary Awarded or Discretionary Bursary Awarded (01/08/2016 to 18/05/2017).

Where applicable, this report provides the following information about students not on-roll on census day: 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), language, nationality, country of birth, part-time status, boarder indicator, attendance, exclusions and Learner Support.

Exclusions Report

Report Criteria: On-roll students and leavers with exclusions two terms ago (01/09/2016 to 31/12/2016). Not applicable to students who have exclusions with appeal result of **Reinstated** or **Not in the best interests of the child**.

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

Attendance Report

Report Criteria: Students with attendance one term ago (01/01/2017 to 16/04/2017). On-roll students and leavers (not boarders) aged four to 15 at 31/08/2016.

This report provides basic student information (i.e. UPN, legal surname, legal forename, date of birth (DOB), gender, year taught in (YTI) and on-roll status) about the students who match the report criteria.

The number of termly sessions possible and the number of termly absence sessions are shown. The columns displayed on the right-hand side of the report shows termly attendance codes for authorised absence sessions and unauthorised absence sessions. Attendance not required sessions (Y) are also shown.

Absentees Report

Report Criteria: Students who have missed 14 sessions and whose absence might need to be tracked. On-roll students and leavers (not boarders) with attendance one term ago (01/01/2017 to 16/04/2017) who were aged four to 15 at 31/08/2016.

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

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

SEN Report

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

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

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

Address Details Report

Report Criteria: Students on-roll on census day.

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

Definition:

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

Free School Meal Eligibility Report

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

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

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

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

Learner Support Report

Report Criteria: On-roll students and leavers aged 16 plus at 31/08/2016 who have been awarded Vulnerable Group and/or Discretionary Bursary funding from 01/08/2016 to 18/05/2017.

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

Top-up Funding Report

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

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

Post Looked After Arrangements Report

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

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

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[®].

Seve Undo	Create & Valid	date 🛄 Summary	Authorise	DetailReport +	
Census Details 2.5	ichool Information	3 Top-up Fund	sing 4 Post Loo	On Roll Basic Details Report	
Consus Details Consus Details Consus Details Consus Summer 2017 Consus Summer 2017 Attendance collected from CO1/08/2016 Stocel Consus Summer 2017 Consumer Support Consuport			er 2017 Attendance colle Exclusions colle FSM collected to	Leavers Basic Details Report Exclusions Report Exclusions Report Attentiance Report SEN Report Address Details Report Address Details Report Fires School Meail Bigshifty Report Learner Support Report Port Looked After Anangements Report Port Looked After Anangements Report	Re. Calculate All Datalis
LA	827	Establishment Nur	Multiple Reports		
Telephone	851234	851234			

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

Detail Reports
☑ On Roll Basic Details Report
Leavers Basic Details Report
Exclusions Report
Attendance Report
Absentees Report
SEN Report
Address Details Report
✓ Free School Meal Eligibility Report
☑ Learner Support 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. The report is saved with a filename that is made up of the following data fields separated by underscores $('_')$:

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

For example:

8234321_SC2_823LL17_001_onroll_pupil_basic_details_report. html.

Example of an On Roll Basic Details report:

school (ensus	Summe	r - 2017	(On Roll I	Basic Da	ta)										
Security M	essage	: This repor	t contains s	ensitive info	mation.											
Report Crite	ria: Stud	ients on roll o	on Census di	ry (18/05/201)	0											
Total Stude	nts: 997															
School Name: Filename: XML Version:	8234	n Abbey School 321_502_623U ation 2016.1.1 -	17_001.UNA	Filenet Numbe Report Create -04.07 EmotList :	£ 27/01/001	,	L04.07 Sv		wy 2016.1.	1 - Released: 20	16-04-07					
UPN	ULN	Legal Sername	Legal Foresame	Preferred Service	Former Sumere	808	Gender	m	DGA	Enrolment Status	Language	Nationality	Country of Birth	YSSA	Part time States	Baard
10022402113104	111110000	Abbens	Gatan	Abbess		28/06/2012	Male	ŀ.	030942014	Single Registration	English	United Kingdom		Obtained	-	Nor.a Dearder
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8823402111004	1111113828	Abbert Abber	Andrew Cameron	Abbel		13/13/2000	Maie Maie	9 11 11	03109/2012 03109/2012	Single Registration	English	United Kingdom	United Kingdom United Kingdom	Refused	Ne	Goarder Not a
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EIIZ3432111004 UE25432111004 HE25432111004 WE2E200108001	11111113428 11111113428 11111113428 1111113428	Aoles Aoles Aoleington Autuan Aoleon	Antrea Cameron Robert Starley Wilam	Adua Adua Ackrington Aukum	- - Call	13/13/2000 10/13/2000 29/13/2000 10/13/2001	Male Male Male Male		03109-2912 03109-2912 03109-2912 03109-2913 01109-2911	Single Registration Single Registration Single Registration	Englah Englah Englah Englah	Unlad Kingdom Unlad Kingdom Unlad Kingdom Unlad Kingdom	United Kingdom United Kingdom United Kingdom United Kingdom United Kingdom	Refused Refused Refused Obtained Uncought	Ne No No No	Ocarder Not a Brander Not a Drander Not a Brander Not a



More Information:

Configuring the Census Folder on page 10 *Transferring Report Data to a Spreadsheet* on page 36

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.

36 *Producing the School Census Summer 2017 Return (English Secondary/Middle deemed Secondary Schools) handbook, applicable to 7.174*

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 is made up of the following data fields separated by underscores $('_')$:

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

For example: 8234321_SC2_823LL17_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 35 Transferring Report Data to a Spreadsheet on page 36 Authorising the Return on page 39 Deleting an Unauthorised Return on page 44

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 29 Producing Detail Reports on page 32 Producing the Summary Report on page 37

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.

SIMS .net	
?	Some attendance marks are missing Do you wish to continue to authorise the return?
	Yes No

 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.

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

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.

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	
	۱ -
	-1
	_
Continue	

- 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 <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:

Producing the Summary Report on page 37 Retrieving Authorised Census Return Files on page 42 Copying a Return on page 43

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 43

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.

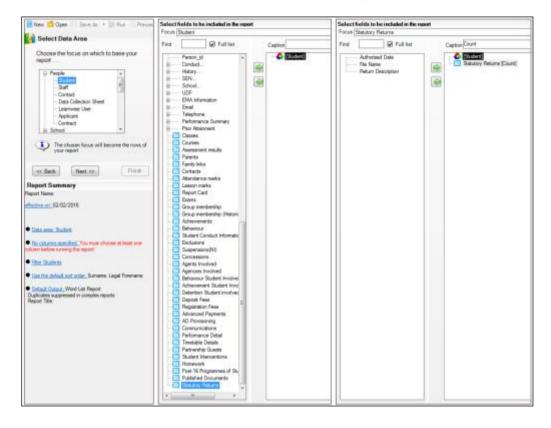
IMPORTANT NOTE: Ensure that authorised personnel only have access to the download folder because the retrieved files contain sensitive information.

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.

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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.

 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.
- 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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