

Preparation Guide

Applicable to 7.174 onwards

Preparing for the School Census Summer 2017 Return

English Secondary/Middle deemed
Secondary, All-Through (Secondary
phase) schools and Pupil Referral
Units (Secondary phase)



School Census Summer 2017 Preparation Check List

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

Complete	Task Description
<input type="checkbox"/>	Check with your System Administrator/Manager that you have the appropriate permissions to run the School Census and to record associated data (please see <i>Setting Permissions</i> on page 2).
<input type="checkbox"/>	Upgrade to the SIMS 2017 Spring Release (SIMS 7.174) or later as soon as possible to enable dry runs to be carried out (please see <i>What Version of SIMS is Required?</i> on page 3).
<input type="checkbox"/>	Check with your System Administrator/Manager that the latest fileset version has been imported (please see <i>Importing Revised Filesets for Validation and Reports</i> on page 4).
<input type="checkbox"/>	Carry out a dry run to determine what information needs to be updated (please see <i>Why Carry out a Dry Run?</i> on page 9).
<input type="checkbox"/>	Check School Level information, e.g. establishment details, school email address, etc. (please see <i>Preparing School Level Information</i> on page 19).
<input type="checkbox"/>	Ensure that leavers and re-admissions have been recorded (please see <i>Recording Leavers and Re-Admissions</i> on page 28), and that any student records created in error have been deleted (please see <i>Deleting Unwanted Student Records</i> on page 32).
<input type="checkbox"/>	Check the students' basic details, e.g. name, date of birth, gender, etc. (please see <i>Checking a Student's Basic Details</i> on page 32).
<input type="checkbox"/>	Check the students' various registration details, e.g. enrolment status, admission date year taught in, UPN, etc. (please see <i>Checking Registration Details</i> on page 34).
<input type="checkbox"/>	Check the students' home address information (please see <i>Checking Home Address Information</i> on page 45).
<input type="checkbox"/>	Check the students' eligibility for free school meals (please see <i>Checking Free School Meals Eligibility</i> on page 47).
<input type="checkbox"/>	Check the students' ethnic and cultural information (please see <i>Checking Ethnic and Cultural Information</i> on page 48).
<input type="checkbox"/>	Check the applicable information recorded in the Additional Information panel (please see <i>Checking Additional Information</i> on page 50).
<input type="checkbox"/>	Check Special Educational Needs information (please see <i>Checking Special Educational Needs Information</i> on page 52).
<input type="checkbox"/>	Check exclusions information (please see <i>Preparing Exclusions Information</i> on page 54).

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Introduction

This preparation guide has been produced to help you to identify the most common tasks that need to be carried out before running the School Census Summer 2017 Return.

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

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

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

How has the School Census Summer Return Changed since Last Year?

Changes to the 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.

Setting Permissions

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

Producing the Return

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

Editing and Preparing Data

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

- Administration Assistant
- Admissions Officer
- School Administrator.

Importing Revised Files

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

- Returns Manager
- System Manager.

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

Where to find More Information about Permissions

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

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

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



Importing Revised Filesets for Validation and Reports

Applicable to the Personnel Officer, Returns Manager and System Manager

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

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

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

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

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

Before Importing the Revised Files

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

If the connection is unsuccessful, check the following details:

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

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

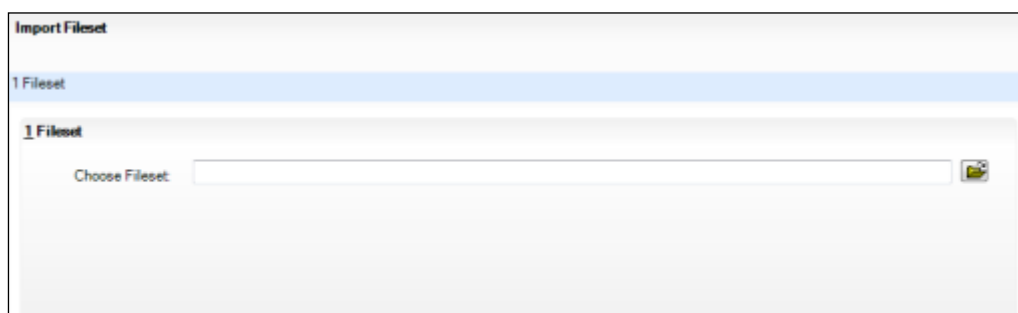


Additional Resources:

Setting up and Administering SIMS handbook

Importing the Revised Files

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

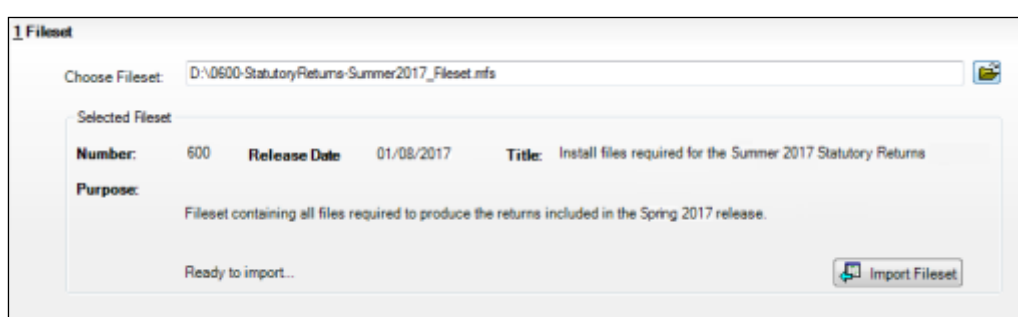


4. Click the **Browse** button to display the **Open** dialog.
5. Navigate to the location of the downloaded fileset. The file name is made up of the following data fields: <Fileset Number>-StatutoryReturns-<Term and Year>_Fileset.mfs.

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

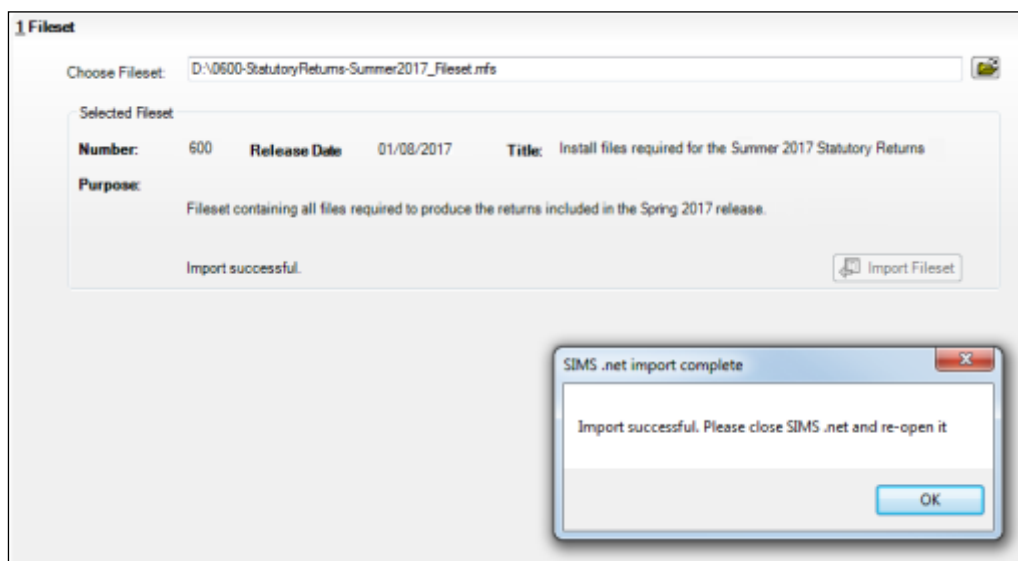
6. Highlight the file then click the **Open** button. Alternatively, double-click the required MFS file to return to the **Import Fileset** page.

NOTE: The following graphics show example data only.



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

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



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

☐ **Completed**

School Census Return Process Flow

The following provides a brief outline of the steps involved in producing the School Census Summer 2017 Return. If data has been regularly and accurately maintained, many of the activities in this document are unnecessary. However, it is advisable to check to ensure that the information is up-to-date.

1. Upgrade to the SIMS 2017 Spring Release (7.174) or later.
2. Carry out one or more dry runs to identify any errors that may exist in your data.
3. Ensure that the relevant student and school data exists in SIMS and that it is complete and correct. Use the Bulk Update routine (**Routines | Student | Bulk Update**) to add missing or correct invalid data, if required.
4. Complete the information on the **Census Return Details** page.
5. Create and validate the return.
6. Resolve any validation errors/queries and then create and validate the return again.

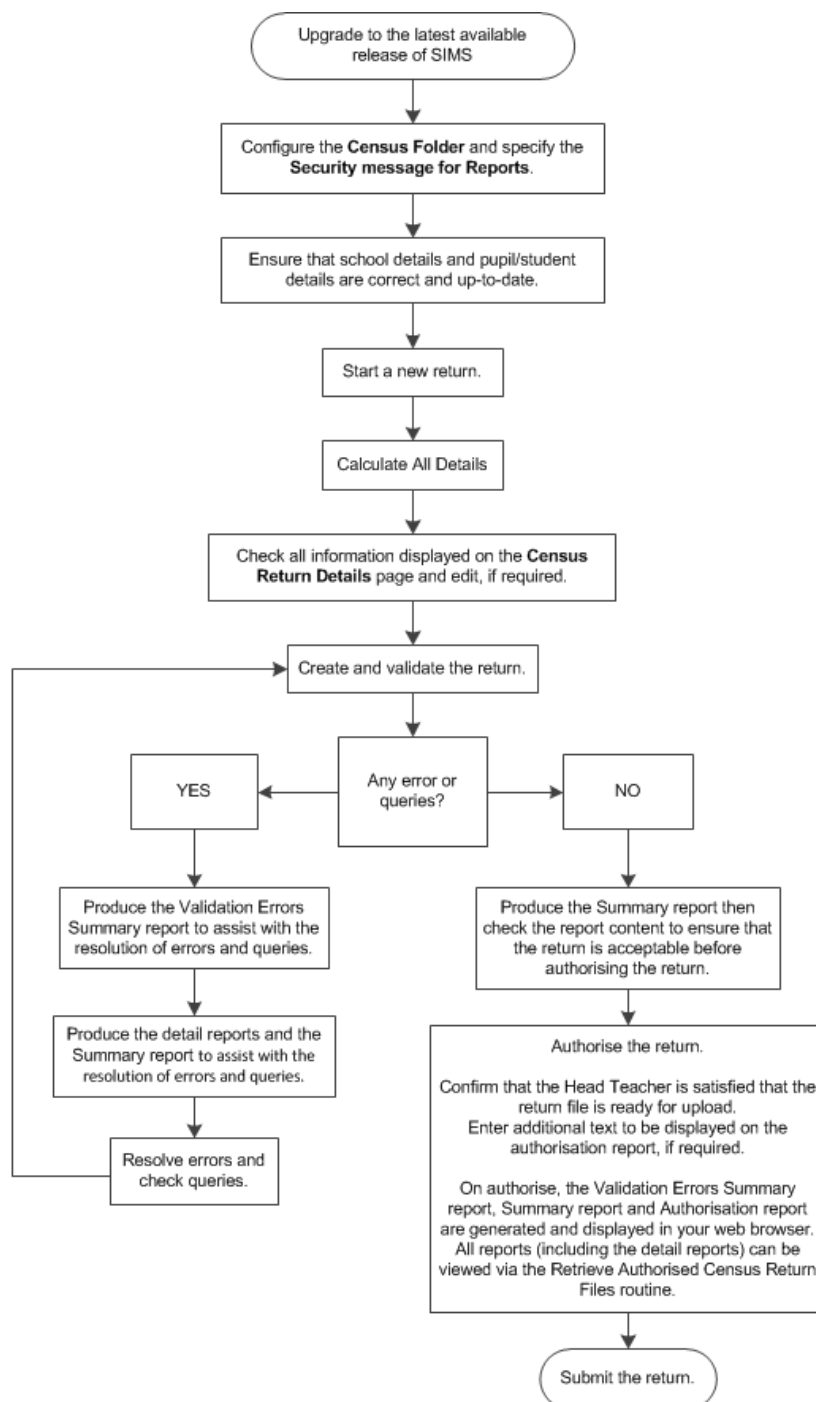
Continue to resolve the validation failures then repeat the Create and Validate routine until you are satisfied that the content of the return is correct.

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

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

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

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



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Why Carry out a Dry Run?

When you have upgraded to the SIMS 2017 Spring Release (7.174), you can carry out one or more dry runs of the return.

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

Whilst a significant number of errors may be generated, many of the errors that relate to students, e.g. language, can be fixed quickly using the Bulk Update routine (please see Updating Information Using the Bulk Update Routine on page 24).

The Dry Run Process

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

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

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

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

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

- By default, the return **Description** is displayed as **School Census Summer 2017**. Edit the **Description** to any name that will clearly distinguish this dry run from the actual return, which will be generated later, e.g. Summer17Test.
- In the **Census Details** panel, click the **Calculate All Details** button to extract the required information from the SIMS database and display the results in the various panels of the **Census Return Details** page.
- If there is any missing or invalid data, an error message is displayed on the Status Bar. This data must be added/corrected before you can create and validate the return.
- Click the **Create & Validate** button to start the validation process. This may take some time. Any missing or invalid data is listed in the **Validation Errors Summary** panel, located at the bottom of the page.



Additional Resources:

Detailed information about completing the individual panels on the **Census Return Details** page is available in the *Producing the School Census Summer 2017 Return (English Secondary/Middle deemed Secondary Schools)* handbook.

Resolving Validation Errors and Checking Queries

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

Type	Sequence	Message	Location	Solution
F	1500	UPN missing	Name: Abraham, Janet Date of Birth: 2005-05-19, Female/UPN	# Go to Focus Student Student Details and add or issue a UPN
F	1500	UPN missing	Name: Reed, Robert Date of Birth: 2009-03-07, Female/UPN	# Go to Focus Student Student Details and add or issue a UPN
F	1500	Pupils aged 5 and over language missing or invalid	Name: Henderson, Jack Date of Birth: 2010-09-07, Male/UPN 402209916228	# Go to Focus Student Student Details Ethnic/Cultural panel and enter First language
F	2390	Insufficient address information provided	Name: Burns, Nick Date of Birth: 2006-07-18, Male/UPN 7402007109712	# Go to Focus Student Student Details Address and enter pupil's address
Q	1407G	Please Check: Pupil's age is out of range for school type	Name: Sengul, Sevan Date of Birth: 2003-02-28, Female, Age: 12/UPN 862000196088	# Go to Focus Student Student Details and enter pupil's date of birth
Q	1420G	Please check: duplicate pupil records with the same Surname, Forename, Gender and Date of birth	Name: Bennett, Hugo Date of Birth: 2010-02-03, Male/UPN	# Go to Focus Student Student Details and check for duplicate pupil record
Q	1420G	Please check: duplicate pupil records with the same Surname, Forename, Gender and Date of birth	Name: Bennett, Hugo Date of Birth: 2010-02-03, Male/UPN 1420209914088	# Go to Focus Student Student Details and check for duplicate pupil record
Q	2385G	Please check: Pupil record with no address details	Name: Bakula, Cyril Date of Birth: 2010-03-14, Female/UPN 032209914005	# Go to Focus Student Student Details Address and enter pupil's address
Q	2420G	Please check: sessions possible should not be greater than 180	Name: Aaron, Lior Date of Birth: 2009-09-07, Female/UPN 402200109032	# Go to Focus Attendance (Lesson Monitor) Display Marks and check the attendance marks
Q	2420G	Please check: sessions possible should not be greater than 180	Name: Aaron, Sophie Date of Birth: 2005-09-01, Female/UPN 402200010904	# Go to Focus Attendance (Lesson Monitor) Display Marks and check the attendance marks

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

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

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

To assist in the resolution of any errors and queries:

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

Type	Sequence	Message	Location	Solution
F	1500	UPN missing	Name: Abraham, Janet Date of Birth: 2005-05-19, Female/UPN	# Go to Focus Student Student Details and add or issue a UPN
F	1500	UPN missing	Name: Reed, Robert Date of Birth: 2009-03-07, Female/UPN	# Go to Focus Student Student Details and add or issue a UPN
F	1500	Pupils aged 5 and over language missing or invalid	Name: Henderson, Jack Date of Birth: 2010-09-07, Male/UPN 402209916228	# Go to Focus Student Student Details Ethnic/Cultural panel and enter First language
F	2390	Insufficient address information provided	Name: Burns, Nick Date of Birth: 2006-07-18, Male/UPN 7402007109712	# Go to Focus Student Student Details Address and enter pupil's address
Q	1407G	Please Check: Pupil's age is out of range for school type	Name: Sengul, Sevan Date of Birth: 2003-02-28, Female, Age: 12/UPN 862000196088	# Go to Focus Student Student Details and enter pupil's date of birth

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

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

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

Error Search	Type	Sequence	Message	Location	Solution
UPN: 402200010101	P	1000	UPN missing	Name: Abraham, Janel Date of Birth: 2005-05-18, Female/UPN	# Go to Focus 1 Student: Student Details and add or update a UPN
UPN: 402200010101	P	1001	UPN missing	Name: Rishi, Pooja Date of Birth: 2005-05-18, Female/UPN	# Go to Focus 1 Student: Student Details and add or update a UPN
UPN: 402200010101	P	1002	UPN missing	Name: Henderson, Jack Date of Birth: 2010-05-01, Male/UPN: 402200010102	# Go to Focus 1 Student: Student Details: Ethnolinguistic parent and enter First language
UPN: 402200010101	P	1003	UPN missing	Name: Bawa, Arin Date of Birth: 2005-01-16, Male/UPN: 402200010102	# Go to Focus 1 Student: Student Details: Address and add/update address
UPN: 402200010101	P	1004	UPN missing	Name: Bawa, Arin Date of Birth: 2005-01-16, Male/UPN: 402200010102	# Go to Focus 1 Student: Student Details and add/update address
UPN: 402200010101	P	1005	UPN missing	Name: Bawa, Arin Date of Birth: 2005-01-16, Male/UPN: 402200010102	# Go to Focus 1 Student: Student Details and add/update address
UPN: 402200010101	P	1006	UPN missing	Name: Bawa, Arin Date of Birth: 2005-01-16, Male/UPN: 402200010102	# Go to Focus 1 Student: Student Details and add/update address
UPN: 402200010101	P	1007	UPN missing	Name: Bawa, Arin Date of Birth: 2005-01-16, Male/UPN: 402200010102	# Go to Focus 1 Student: Student Details and add/update address
UPN: 402200010101	P	1008	UPN missing	Name: Bawa, Arin Date of Birth: 2005-01-16, Male/UPN: 402200010102	# Go to Focus 1 Student: Student Details and add/update address
UPN: 402200010101	P	1009	UPN missing	Name: Bawa, Arin Date of Birth: 2005-01-16, Male/UPN: 402200010102	# Go to Focus 1 Student: Student Details and add/update address
UPN: 402200010101	P	1010	UPN missing	Name: Bawa, Arin Date of Birth: 2005-01-16, Male/UPN: 402200010102	# Go to Focus 1 Student: Student Details and add/update address

- 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.

Error Search	Type	Sequence	Message	Location	Solution
UPN: 402200010101	P	1000	UPN missing	Name: Abraham, Janel Date of Birth: 2005-05-18, Female/UPN	# Go to Focus 1 Student: Student Details and add or update a UPN
UPN: 402200010101	P	1001	UPN missing	Name: Rishi, Pooja Date of Birth: 2005-05-18, Female/UPN	# Go to Focus 1 Student: Student Details and add or update a UPN
UPN: 402200010101	P	1002	UPN missing	Name: Henderson, Jack Date of Birth: 2010-05-01, Male/UPN: 402200010102	# Go to Focus 1 Student: Student Details: Ethnolinguistic parent and enter First language
UPN: 402200010101	P	1003	UPN missing	Name: Bawa, Arin Date of Birth: 2005-01-16, Male/UPN: 402200010102	# Go to Focus 1 Student: Student Details: Address and add/update address
UPN: 402200010101	P	1004	UPN missing	Name: Bawa, Arin Date of Birth: 2005-01-16, Male/UPN: 402200010102	# Go to Focus 1 Student: Student Details and add/update address
UPN: 402200010101	P	1005	UPN missing	Name: Bawa, Arin Date of Birth: 2005-01-16, Male/UPN: 402200010102	# Go to Focus 1 Student: Student Details and add/update address
UPN: 402200010101	P	1006	UPN missing	Name: Bawa, Arin Date of Birth: 2005-01-16, Male/UPN: 402200010102	# Go to Focus 1 Student: Student Details and add/update address
UPN: 402200010101	P	1007	UPN missing	Name: Bawa, Arin Date of Birth: 2005-01-16, Male/UPN: 402200010102	# Go to Focus 1 Student: Student Details and add/update address
UPN: 402200010101	P	1008	UPN missing	Name: Bawa, Arin Date of Birth: 2005-01-16, Male/UPN: 402200010102	# Go to Focus 1 Student: Student Details and add/update address
UPN: 402200010101	P	1009	UPN missing	Name: Bawa, Arin Date of Birth: 2005-01-16, Male/UPN: 402200010102	# Go to Focus 1 Student: Student Details and add/update address
UPN: 402200010101	P	1010	UPN missing	Name: Bawa, Arin Date of Birth: 2005-01-16, Male/UPN: 402200010102	# Go to Focus 1 Student: Student Details and add/update address

- 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.

Error Search	Type	Sequence	Message	Location	Solution
UPN: 402200010101	P	1000	UPN missing	Name: Abraham, Janel Date of Birth: 2005-05-18, Female/UPN	# Go to Focus 1 Student: Student Details and add or update a UPN
UPN: 402200010101	P	1001	UPN missing	Name: Rishi, Pooja Date of Birth: 2005-05-18, Female/UPN	# Go to Focus 1 Student: Student Details and add or update a UPN
UPN: 402200010101	P	1002	UPN missing	Name: Henderson, Jack Date of Birth: 2010-05-01, Male/UPN: 402200010102	# Go to Focus 1 Student: Student Details: Ethnolinguistic parent and enter First language
UPN: 402200010101	P	1003	UPN missing	Name: Bawa, Arin Date of Birth: 2005-01-16, Male/UPN: 402200010102	# Go to Focus 1 Student: Student Details: Address and add/update address
UPN: 402200010101	P	1004	UPN missing	Name: Bawa, Arin Date of Birth: 2005-01-16, Male/UPN: 402200010102	# Go to Focus 1 Student: Student Details and add/update address
UPN: 402200010101	P	1005	UPN missing	Name: Bawa, Arin Date of Birth: 2005-01-16, Male/UPN: 402200010102	# Go to Focus 1 Student: Student Details and add/update address
UPN: 402200010101	P	1006	UPN missing	Name: Bawa, Arin Date of Birth: 2005-01-16, Male/UPN: 402200010102	# Go to Focus 1 Student: Student Details and add/update address
UPN: 402200010101	P	1007	UPN missing	Name: Bawa, Arin Date of Birth: 2005-01-16, Male/UPN: 402200010102	# Go to Focus 1 Student: Student Details and add/update address
UPN: 402200010101	P	1008	UPN missing	Name: Bawa, Arin Date of Birth: 2005-01-16, Male/UPN: 402200010102	# Go to Focus 1 Student: Student Details and add/update address
UPN: 402200010101	P	1009	UPN missing	Name: Bawa, Arin Date of Birth: 2005-01-16, Male/UPN: 402200010102	# Go to Focus 1 Student: Student Details and add/update address
UPN: 402200010101	P	1010	UPN missing	Name: Bawa, Arin Date of Birth: 2005-01-16, Male/UPN: 402200010102	# Go to Focus 1 Student: Student Details and add/update address

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

[illegible]

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.

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

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

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

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

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

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

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

Producing Detail Reports

Detail reports can be used to check the data stored in SIMS that has been used to create the return.

The 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, hours at setting and funded hours.

*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

NOTE: Students are only included in the return as leavers if they have attendance, exclusions or learner support data that falls within the collection period.

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, where applicable: 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

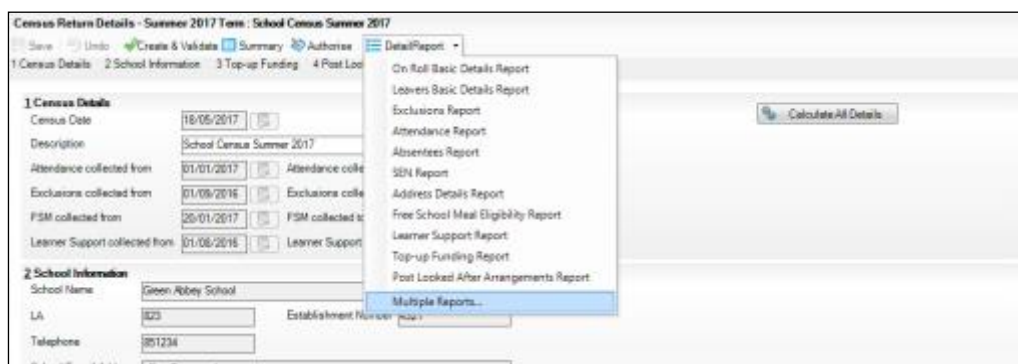
Report Criteria: On-roll students who have post looked after arrangements as at census day.

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

Selecting a Single Detail Report

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



Selecting Multiple Detail Reports

1. Select **Multiple Reports...** from the bottom of the **Detail Report** drop-down list to display the **Detail Reports** dialog. By default, all detail reports are selected.
2. If any reports are not required, deselect the associated check boxes.
3. Click the **Report** button to generate the selected reports, which are displayed in your web browser.

The report(s) are saved automatically in the folder specified in the **Census Return for Summer Term** browser.

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



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Checking Establishment Details

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

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

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

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

The screenshot shows the 'Establishment' tab in the SIMS system. The form contains the following fields and values:

- School Name:** Green Abbey School
- LA:** 823 Central Bedfordshire
- Establishment Number:** 4321
- Unique Reference Number:** (empty)
- UK Provider Reference Number:** (empty)
- School Phase:** Secondary
- School Type:** Comprehensive all through 11-16
- School Governance:** Community
- Intake Type:** Comprehensive
- Previous School Name:** (empty)
- Previous Estab. Number:** (empty)
- Previous URN Number:** (empty)
- Boarding Pupils:** ☐ Nursery Class ☐ Special Class or Unit
- Head Teacher:** Mr Adrian Blacker
- Curriculum Years:** 7 to 13
- Pupil Gender:** Coeducational
- Gender on entry to school:** Coeducational
- Gender on entry to 8th form:** Coeducational
- NC Year Start Date (dd/mm):** 1 / 9
- School Specialism:** Arts, Business and Enterprise, Engineering, Humanities
- Extended Services:** Before school childcare and/or activities for school-age children (part-time), After school childcare and/or activities for school-age children (part-time), Childcare and/or activities for school-age children during school holidays, Childcare integrated with a nursery education place for three and four year old...
- No. of Childcare Places:** 0

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

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

Information for Academies:

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

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

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



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

☐ Completed

Checking School Telephone and Email Information

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

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

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

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

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

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

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

☐ **Completed**

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Checking Student Details

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

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

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

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

The following sections in this guide provide additional information and specific instructions on checking and editing student level data. Some of this data can be checked/updated using the Bulk Update routine (please see *Updating Information Using the Bulk Update Routine* on page 24).

When you have upgraded to the SIMS 2017 Spring Release (7.174), you are strongly advised to carry out one or more dry runs in order to identify any validation errors and queries that must be resolved before the return is submitted (please see *Why Carry out a Dry Run?* on page 9).

Updating Information Using the Bulk Update Routine

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

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

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

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

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

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

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

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

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

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

Update Data Item

Data Item

Effective Date

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

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

Bulk update Student

Search Browse

Links Help Close

Bulk Update

Student Population

Group Type Year Group

Group <ANY>

Effective Date 09/02/2017

Update Data Item

Data Item First Language

Effective Date 09/02/2017

04| Preparing Student Level Information

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

Bulk Update First Language (as from 09/03/2017) - Year Group: **YNTY** (as at 09/03/2017)

1 Members

Name	Year Group	Assigned	Arabic	Arberge	Ala-Saho	Abikaana	Alan-Yee-Faria	Albanian/Shqip	Alur	Ambo/Cakewen be	Amharic
Abbott, Graham	7	English									
Abbey, Gremetta	10	English									
Abbey, Jimmy	12	English									
Abbey, Sean	7	English									
Abbot, Andrew	9	English									
Abbot, Ben	10	English									
Abbot, Claire	13	English									
Abbot, Hannah	11	English									
Abbot, Susan	12	English									
Abba, Cameron	9	English									
Abrahams, Jerral	10	English									
Jackington, Robert	9	English									
Adkison, Bill	10	English									
Adkison, Stan	8	English									
Adcox, Samantha	7	English									
Adams, Melanie	11	English									
Adedeji, Payal	9	English									
Adkins, Richard	11	English									
Adrianose, Robert	8	English									
Affley, Brian	8	English									
Affleck, Alexis	6	English									
Agathodoulos, Joe	9	English									
Ahmed, Carina	9	Kashmiri									
Ahmed, Jackson	10	Arabic									
Alexworth, Alison	11	English									
Alexworth, Zoe	12	English									
Alnisi, Mohammed	10	Arabic									
Alison, Frederick	9	English									
Alcott, Allys	8	English									
Albridge, Courtney	9	English									
Alley, Tricia	8	English									
Allen, Megan	13	English									
Total	1076		1076	0	0	0	0	0	4	0	0

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

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

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

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

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

Name	Year Group	Assigned	Opengha/Shut Anise	Ebra	Edu/Sri	Ela-Ribic	English	Esar/Isan	Estonian	Eve	Esondo
Abbey, Graham	7	English					✓				
Abbey, Gracetta	10	English					✓				
Abbey, Jimmy	12	English					✓				
Abbey, Sean	7	English					✓				
Abbot, Andrew	9	English					✓				
Abbot, Ben	10	English					✓				
Abbot, Claire	13	English					✓				
Abbot, Hannah	11	English					✓				
Abbot, Susan	12	English					✓				
Able, Cameron	9	English					✓				
Abrahams, Jacqui	10	English					✓				
Adkington, Robert	9	English					✓				
Adkin, Bill	10	English					✓				
Adkin, Stan	8	English					✓				
Adon, Samantha	7	English					✓				
Adams, Melanie	11	English					✓				
Adediji, Payal	9	English					✓				
Adkins, Richard	11	English					✓				
Adrianson, Robert	8	English					✓				
Affley, Brian	8	English					✓				
Affleck, Alexis	8	English					✓				
Agathodorous, Joe	9	English					✓				
Ahmed, Carina	9	Kashmiri									
Ahmed, Ackmar	10	Arabic									
Ainsworth, Alison	11	English					✓				
Ainsworth, Zoe	12	English					✓				
Ajmal, Mohammed	10	Arabic									
Alban, Frederick	9	English					✓				
Alcott, Alwyn	8	English					✓				
Aldridge, Courtney	9	English					✓				
Alley, Trista	8	English					✓				
Allen, Megan	13	English					✓				
Total	10/16		10/16	0	0	0	0	908	0	0	2

All the cells within that column are populated with ticks.

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

Name	Year Group	Assigned	Opengha/Shut Anise	Ebra	Edu/Sri	Ela-Ribic	English	Esar/Isan	Estonian	Eve	Esondo
Abbey, Graham	7	English					✓				
Abbey, Gracetta	10	English					✓				
Abbey, Jimmy	12	English					✓				
Abbey, Sean	7	English					✓				
Abbot, Andrew	9	English					✓				
Abbot, Ben	10	English					✓				
Abbot, Claire	13	English					✓				
Abbot, Hannah	11	English					✓				
Abbot, Susan	12	English					✓				
Able, Cameron	9	Estonian							✓		
Abrahams, Jacqui	10	English					✓				
Adkington, Robert	9	English					✓				
Adkin, Bill	10	English					✓				
Adkin, Stan	8	English					✓				
Adon, Samantha	7	English					✓				
Adams, Melanie	11	English					✓				
Adediji, Payal	9	English					✓				
Adkins, Richard	11	English					✓				
Adrianson, Robert	8	English					✓				
Affley, Brian	8	English					✓				
Affleck, Alexis	8	English					✓				
Agathodorous, Joe	9	English					✓				
Ahmed, Carina	9	English					✓				
Ahmed, Ackmar	10	English					✓				
Ainsworth, Alison	11	English					✓				
Ainsworth, Zoe	12	English					✓				
Ajmal, Mohammed	10	English					✓				
Alban, Frederick	9	English					✓				
Alcott, Alwyn	8	English					✓				
Aldridge, Courtney	9	English					✓				
Alley, Trista	8	English					✓				
Allen, Megan	13	English					✓				
Total	10/16		10/16	0	0	0	1015	0	1	0	0

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

Bulk Updating Data for a Selection of Students

There are two methods for selecting a number of students.

Entering a Value for a Selection of Students

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

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

Entering a Value for Sequentially Listed Students

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

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

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

Recording Leavers and Re-Admissions

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

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

Recording a Leaver

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

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

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

Name	Year Group	Reg. Group	Adm. No.	Date of Admission	Date of Leaving	Reason for Leaving	Destination
Abbess, Graham	9	SA	004504	03/09/2014			
Abbey, Grenella	12	G	003979	01/09/2011			
Abbey, Sean	9	9B	004505	03/09/2014			
Abbot, Andrew	11	11E	004163	03/09/2012			
Able, Cameron	11	11A	004164	03/09/2012			
Ackinton, Robert	11	11D	004165	03/09/2012			

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

1 Leaving Information

Date of Leaving:

Reason for leaving: [Red]

Destination after Leaving:

Destination Expected Start Date:

Learning Aim Withdrawal Reason:

2 Students

Name	Year Group	Reg. Group	Adm. No.	Date of Admission	Date of Leaving	Reason for Leaving	Destination
Abbey, Sean	9	9B	004505	03/09/2014			

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

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

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

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

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

04| Preparing Student Level Information

7. Enter the **Destination after Leaving** if known, e.g. the name of the student's next school.
8. Enter the **Destination Expected Start Date**, if known. This is the intended date of starting at the next school and is particularly useful when:
 - in year transfers take place
 - a student's name is deleted from the admission register and the school must inform the local authority.
9. Select the **Learning Aim Withdrawal Reason** from the drop-down list, e.g. **Other Provider, Illness/Injury, Personal**, etc. to explain why the student is leaving the learning aim before the expected end date.
10. Assign the information to the applicable students by either:
 - highlighting the students to whom this information applies then clicking the **Assign to Selected** button; or
 - if the information applies to all the students in the list, clicking the **Assign to All** button.

Manage Student(s) Leaving Details

Save Print

1 Leaving Information 2 Students

1 Leaving Information

Date of Leaving: 07/02/2017 Reason for leaving: Elective Home Education

Destination after Leaving: Home Address

Destination Expected Start Date: 13/02/2017

Learning Aim Withdrawal Reason: Injury/Illness

Assign to All Assign to Selected

2 Students

Name	Year Group	Reg. Group	Adm. No.	Date of Admission	Date of Leaving	Reason for Leaving	Destination	Remove
Abbey, Sean	9	9B	004505	03/09/2014	07/02/2017	Elective Home Ed...	Home Addr...	Clear

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

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

13. Click the **Save** button.

 **Completed**

Re-Admitting a Student

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

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

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

1. Select **Focus | Student | Student Details** to display the **Find Student** browser.
2. Click the **New** button to display the **Add Student** page. It is necessary to enter limited information here as you know that the person already exists.
3. Click the **Continue** button to display a list of **Matched People**, based on the criteria entered on the **Add Student** page.
4. Highlight the required student then click the **Open** button. The following warning message is displayed:

The selected student is a leaver. Do you want to re-admit the student?

5. Click the **Yes** button if you are certain that this is the student who should be re-admitted. Their details are displayed on the **Student Details** page.
6. Complete the mandatory fields (**Date of birth, Gender, Year Group, Enrolment Status, Year Taught In** and **Admission Date**) and check any other details that may have changed since they were last on-roll, such as their address.
7. Check that the original **UPN** is displayed.

If it did not previously exist, generate a new **UPN** by clicking the button adjacent to the **UPN** field to display the **Issue UPN** dialog.

Select either the **Issue Permanent** or **Issue Temporary UPN** radio button then click the **OK** button to return to the **Registration** panel.

The temporary/permanent UPN is issued on save.

8. Click the **Save** button to re-admit the student.

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

☐ Completed

Deleting Unwanted Student Records

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

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








Completed

Checking a Student's Basic Details

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

The following information is collected in the return:

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

1 Basic Details		Photograph
Legal Forename	<input type="text" value="Graham"/>	 <div style="text-align: right;">   </div>
Middle Name(s)	<input type="text"/>	
Legal Surname	<input type="text" value="Abbess"/>	
Preferred Surname	<input type="text" value="Abbess"/>	
Preferred Forename	<input type="text" value="Graham"/>	
Date of birth	<input type="text" value="29/09/2002"/> 	
Age	<input type="text" value="14 years"/>	
Gender	<input type="text" value="Male"/>	
Birth Certificate Seen	<input type="checkbox"/>	<div>History</div>
 Quick Note		

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

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

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

☐ Completed



More Information:

Recording a Student's Change of Surname on page 33

Recording a Student's Change of Surname

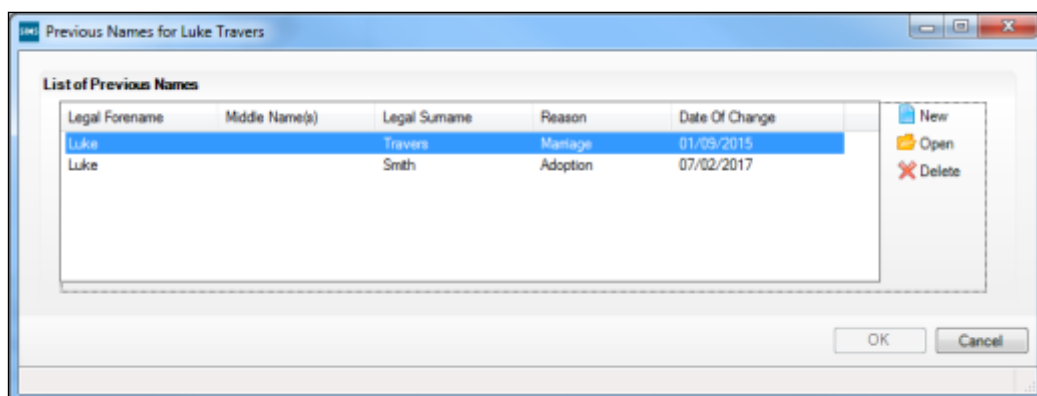
It is a requirement of the return that a history of students' previous surname(s) is recorded.

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

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

04| Preparing Student Level Information

8. To view a list of the student's previous names, click the **History** button to display the **Previous Names for** dialog.



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

☐ Completed

Checking Registration Details

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

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

Checking Enrolment Status, Admission Date and Boarder Status

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

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

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

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

 **Completed**

Checking Unique Pupil Numbers

The following information is collected in the return:

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

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

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

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

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

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



Generate UPN button

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

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

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

DfE guidance is also available on the GOV.UK website (<https://www.gov.uk/government/publications/unique-pupil-numbers>).



Completed

Checking Unique Learner Numbers

Applicable to Secondary/middle deemed Secondary and All-Through, Special and Pupil Referral Units that have a Secondary phase

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

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

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

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

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

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

2 Registration

Registration Group	9A	House	Boyle				
Year Group	Year 9	Year Taught In	Curriculum Year 9				
Enrolment Status	Single Registration	Boarder Status	Not a Boarder				
Admission Date	03/09/2014	Admission Number	004504				
Former UPN		Attendance Mode	All day				
UPN	N823432113104	Local UPN					
Unique Learner Number	1111176638	Exam Number					
UCI							
Part Time Details	<table border="1"> <thead> <tr> <th>Start Date</th> <th>End Date</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> </tr> </tbody> </table>		Start Date	End Date			<input type="button" value="New"/> <input type="button" value="Open"/> <input type="button" value="Delete"/>
Start Date	End Date						

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

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

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

☐ **Completed**

Checking Student's Part-Time Details

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

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

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

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

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

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

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

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

☐ Completed

Checking National Curriculum Year Groups

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

For the School Census Summer 2017 Return, the collection of data uses the Age at Date as at 31/08/2016.

The following table shows the Curriculum Year that students in England are expected to be taught in, according to their date of birth (during the academic year 2016/2017). This table is provided for reference only.

Curriculum Year the Student would Normally be Taught in	Date of Birth Range	Age Range
	After 31/08/2014	1 and under
N1	01/09/2013 to 31/08/2014	2 – 3
N2	01/09/2012 to 31/08/2013	3 – 4
R	01/09/2011 to 31/08/2012	4 – 5
1	01/09/2010 to 31/08/2011	5 – 6
2	01/09/2009 to 31/08/2010	6 – 7
3	01/09/2008 to 31/08/2009	7 – 8
4	01/09/2007 to 31/08/2008	8 – 9
5	01/09/2006 to 31/08/2007	9 – 10
6	01/09/2005 to 31/08/2006	10 – 11
7	01/09/2004 to 31/08/2005	11 – 12
8	01/09/2003 to 31/08/2004	12 – 13
9	01/09/2002 to 31/08/2003	13 – 14
10	01/09/2001 to 31/08/2002	14 – 15
11	01/09/2000 to 31/08/2001	15 – 16
12	01/09/1999 to 31/08/2000	16 – 17
13	01/09/1998 to 31/08/1999	17 – 18
	Before 31/08/1998	19+

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

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



Additional Resources:

Managing Pupil/Students handbook
Setting up and Administering SIMS handbook

Checking the Student's Year Taught In Record

Year Taught In is mandatory information in SIMS.

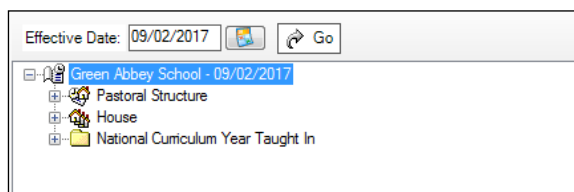
1. Select **Focus | Student | Student Details** to display the **Find Student** browser.
2. Search for then double-click the name of the required student to display the **Student Details** page.
3. Click the **Registration** hyperlink to display the **Registration** panel.

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

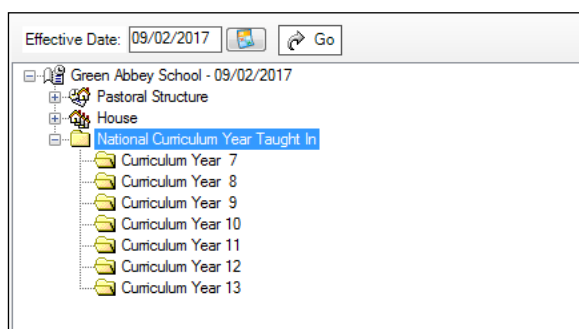
NOTE: Any change made in the **Registration** panel is effective from today's date. If the **Year Taught In** change was applicable from an earlier date, click the **History** button and apply the change from the actual date the change is required.

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

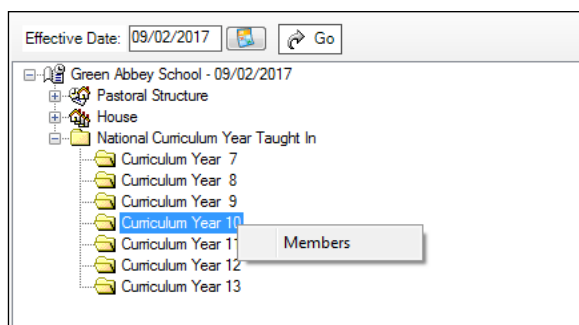
1. Select **Focus | School | Pastoral Structure | Current Structure** to display the **Current Academic Year Pastoral Structure** page.
2. Click the **Go** button.



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



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



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

Name	Gender	Year Group	Reg Group	DOB	7	8	9	10	11	12	13
Ackton, Stan	Male	Year 10	10A	18/12/2001							
Adrianson, Robert	Male	Year 10	10B	10/09/2001							
Affley, Brian	Male	Year 10	10C	09/09/2001							
Affleck, Alexis	Female	Year 10	10D	20/07/2002							
Alcott, Alwyn	Male	Year 10	10E	11/11/2001							
Alfrey, Trista	Female	Year 10	10F	27/02/2002							
Aloia, Paolo	Male	Year 10	10F	20/07/2002							
Arkwrightson, Robert	Male	Year 10	10E	13/12/2001							
Ashford, Tobias	Male	Year 10	10D	11/12/2001							
Bagnall, Keith	Male	Year 10	10C	19/05/2002							
Bark, Dolores	Female	Year 10	10B	13/05/2002							
Total					0	0	0	161	0	0	0

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

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

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

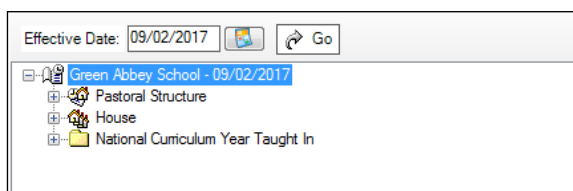
Name	Gender	Year Group	Reg Group	DOB	7	8	9	10	11	12	13
Ackton, Stan	Male	Year 10	10A	18/12/2001							
Adrianson, Robert	Male	Year 10	10B	10/09/2001							
Affley, Brian	Male	Year 10	10C	09/09/2001							
Affleck, Alexis	Female	Year 10	10D	20/07/2002							
Alcott, Alwyn	Male	Year 10	10E	11/11/2001							
Alfrey, Trista	Female	Year 10	10F	27/02/2002							
Aloia, Paolo	Male	Year 10	10F	20/07/2002							
Arkwrightson, Robert	Male	Year 10	10E	13/12/2001							
Ashford, Tobias	Male	Year 10	10D	11/12/2001							
Bagnall, Keith	Male	Year 10	10C	19/05/2002							
Bark, Dolores	Female	Year 10	10B	13/05/2002							
Total					0	0	0	160	1	0	0

04| Preparing Student Level Information

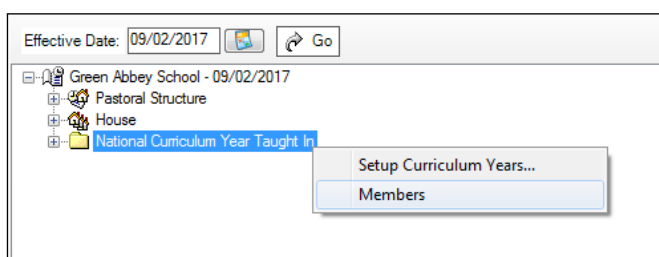
7. Ensure that all students are allocated membership to the correct **National Curriculum Year Taught In** and then click the **OK** button to return to the **Current Academic Year Pastoral Structure** page.
8. Repeat for the other curriculum years, where applicable.
9. Click **Save** button.

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

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



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



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

Name	Gender	Year Group	Reg Group	DOB	7	8	9	10	11	12	13
Abbess, Graham	Male	Year 9	9A	29/09/2002			✓				
Abbey, Grenetta	Female	Year 12	G	24/07/2000						✓	
Abbey, Sean	Male	Year 9	9B	19/09/2002			✓				
Abbot, Andrew	Male	Year 11	11E	13/12/2000					✓		
Able, Cameron	Male	Year 11	11A	10/12/2000					✓		
Ackrington, Robert	Male	Year 11	11D	29/12/2000					✓		
Ackton, Bill	Male	Year 12	H	11/06/1998						✓	
Ackton, Stan	Male	Year 10	10A	18/12/2001				✓			
Acton, Jordan	Male	Year 8	8F	11/02/2004		✓					
Acton, Samantha	Female	Year 9	9A	25/03/2003			✓				
Adams, Adam	Male	Year 7	7A	31/08/2005	✓						
Total					160	160	159	161	178	90	90

4. Ensure that the **Effective Date Range** is changed to **Over the whole academic year** by selecting the radio button.

By default, the records are displayed in alphabetical surname order. Sorting the names in year group order assists in locating students who do not have a **Year Taught In** selected.

5. Right-click the **Year Group** heading then select **Sort By** from the pop-up menu. Any students who have not been allocated a year taught in are displayed at the top of the list.

Name	Gender	Year Group	Reg Group	DOB	7	8	9	10	11	12	13
Adams, Adam	Male	Year		18/2005							
Ashdown, Roe	Male	Year		9/2004							
Badger, David	Male	Year		9/2004	✓						
Bailey, Gareth	Male	Year 7	7D	16/07/2005	✓						
Bailey, Liam	Male	Year 7	7E	04/08/2005	✓						
Bains, Kirk	Male	Year 7	7F	18/01/2005	✓						
Baker, Jordan	Male	Year 7	7F	30/03/2005	✓						
Bartle, Grace	Female	Year 7	7E	04/05/2005	✓						
Bellic, Nico	Male	Year 7	7D	06/05/2005	✓						
Bellic, Roman	Male	Year 7	7C	06/05/2005	✓						
Bernard, Edward	Male	Year 7	7B	04/12/2004	✓						
Total					160	160	159	161	178	90	90

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

☐ Completed

Checking Home Address Information

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

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

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

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

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

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

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

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

☐ **Completed**

Checking Free School Meals Eligibility

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

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

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

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

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

6 Dietary

Meal Patterns

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

Eligible for Free Meals

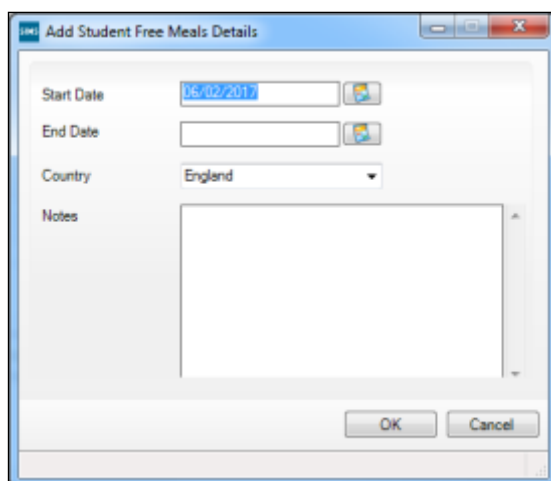
Start Date	End Date	Country	Notes
15/09/2014		England	

FSM Review Date: 01/09/2017

4. Ensure the minimum of a **Start Date** and **Country** are displayed in the **Eligible for Free Meals** panel. If you need to edit the data, highlight the required record then click the **Open** button.

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If a new record is required, click the adjacent **New** button to display the **Add Student Free Meals Details** dialog.



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

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

☐ **Completed**

Checking Ethnic and Cultural Information

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

- **First Language**
 - A First Language other than English should be recorded where a student was exposed to the language during early development and continues to be exposed to this language at home or in the community.
 - If the child was exposed to more than one language (which may include English) during early development, the language other than English should be recorded, irrespective of the student's proficiency in English.
- **Country of Birth** included in the School Census Summer Return for the first time.
- Nationality (**Nation**) included in the School Census Summer Return for the first time.

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

8 Ethnic/Cultural

<u>Ethnicity</u>	White - English	Ethnic Data Source	Provided by the parent
<u>First Language</u>	English	<u>Religion</u>	Christian
First Language Source		English Additional Language	No
Asylum Status		Traveller Status	
National Identity		Speaks Welsh	
<u>Home Language</u>	English		
Country of Birth	United Kingdom		

Nationality	Passport Number	Passport Expiry date	
United Kingdom			New Open Delete

Date of Assessment	Level	
05/09/2016	E - Fluent	New Open Delete

4. Select the student's **First Language** from the drop-down list.
5. Select the student's **Country of Birth**:
 - a. Click the **Browse** button to display the **Nation Browse** dialog.
 - b. Highlight the required country then click the **OK** button to return to the **Ethnic/Cultural** panel.
6. If the student's Nationality is not recorded:
 - a. Click the **New** button adjacent to the **Nationality and Passport Details** section to display the **Add Student Nationality** dialog.
 - b. In the **Nation Details** panel, click the **Browse** button to display the **Nation** browser.
 - c. Highlight the required nation then click the **OK** button to return to the **Add Student Nationality** dialog.
 - d. Enter **Passport Detail**, if known.
 - e. Enter **Tier4 Details**, if applicable to your school.
 - f. Click the **OK** button to the **Ethnic/Cultural** panel.
7. Click the **Save** button.

TIPS:

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

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

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



Checking Additional Information

Ensure that the following additional information is recorded in SIMS:

- **Youth Support Services Agreement (YSSA)** status
The YSSA replaces Connexions. It applies to students between age 12 and 25 with special educational needs and students between age 12 and 20 with no special educational needs.
- **Learner Support Code**, e.g. Post 16 Bursary of Vulnerable Group Bursary Awarded, Discretionary Bursary Awarded, etc. for 16 to 19 year olds

The Bulk Update routine can be used to assign and edit these values for a specific selection of students at the same time, if required (please see *Updating Information Using the Bulk Update Routine* on page 24).

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

3. Click the **Additional Information** hyperlink to display the **Additional Information** panel.

9 Additional Information

Meals

☒ Free Meal
☐ Home
☐ Sandwiches

Modes of travel

☐ Boarder - not applicable
☐ Bus (type not known)
☐ Car Share (with child/children)

Service Children in Education Yes

Uniform Allowance ☐

Pupil Premium Indicator for year 2016/2017 ☒ Notes: Waiting for documentation.

Learner Support

Learner Support Code	Award Date	Notes
Vulnerable Group Bursary Awarded	12/09/2016	

Recoupment England

Youth Support Services Agreement Obtained

Route East Town

LA Provided Transport ☒

Source of Service Children in Education Provided by the parent

Buttons: New, Open, Delete

*NOTE: The **Meals** section will be removed in a future release because the meal information is now entered via the **Dietary** panel.*

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

NOTE: YSSA replaced Connexions Assent.

5. Ensure that the **Pupil Premium Indicator for year 2016/2017** check box is selected, if applicable. To enter a note related to the applicable year, click the **Search** button adjacent to the **Notes** field.

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

6. Check that the **Learner Support** details are correct.

Adding a new Learner Support record:

- a. Click the **New** button to display the **Student Learner Support Code Details** dialog.
- b. Select the applicable **Learner Support Code** from the drop-down list.
- c. Enter an **Award Date** or click the **Calendar** button then select the required date. **Notes** can be entered, if required.

Updating an existing Learner Support record:

- a. Highlight the required record then click the **Open** button **Student Learner Support Code Details** dialog.
- b. Amend the **Learner Support** details, as required.

☐ Completed

Checking Special Educational Needs Information

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

SEN **Status** (SEN Provision)

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

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

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

The screenshot shows the 'Find SEN Student' browser interface. It includes search filters for Surname, Forename, Status (Current), SEN Status (Any SEN), Tier (Any), Year Group (Any), Reg Group (Any), and House (Any). Below the filters is a table of search results with columns: Name, Year Group, Reg Group, House, Gender, and SEN Status.

Name	Year Group	Reg Group	House	Gender	SEN Status
Alen, Faith	8	8C	Cute	Female	M - Monitor Language Skills
Bagnall, Keith	7	7C	Hooka	Male	A - School/Early Years Action
Sanderson, Jose	8	8D	Cute	Male	M - Monitor Language Skills
Sanderson, Maria	8	8E	Penning	Female	M - Monitor Language Skills
Stears, Jill	9	9F	Penning	Female	S - Statement
Boyle, Matt	11	11C	Cute	Male	A - School/Early Years Action
Candy, Molly	9	9B	Boyle	Female	P - School/Early Years Action

4. Double-click the name of the required student to display the **Student SEN details** page.

5. Click the **Basic SEN Details** hyperlink to display the **Basic SEN Details** panel.

3 Basic SEN Details

Status: K - SEN Support Start Date: 05/02/2015 [New] [Edit]

[Status History]

Statement Pending?:

Current Needs

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

[New] [Open] [Delete] [Report]

[Needs History] [Change Log] [Move Up] [Move Down]

Full Descriptions

Attachment	Summary	Type	Owner
IEP May 2015	SEN Document	SEN Document	Grosvenor Gillian

[New] [Open] [Delete]

Additional Support:

Curriculum and Teaching Methods: Some curriculum modifications

Grouping and Support: Targeted and sustained additional support

Advice and Assessment: External advice/assessment

Specialised Resources: Individual access to normally available equipment

6. Ensure that the SEN **Status** and **Start Date** are correct.

To amend an error in the current **Status** or **Start Date**, click the **Edit** button. Select the required **Status** from the drop-down list and edit the **Start Date**, if required.

Alternatively, click the **New** button. This removes the original **Status** and the **Start Date** defaults to today's date. Select the applicable **Status** and change the **Start Date**, if required.

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

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

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

The DfE website

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

☐ Completed

Preparing Exclusions Information

Exclusions information is required for students who were subject to any exclusion with a start date during the period 01/09/2016 to 31/12/2016 inclusive. Exclusions should not be counted if the Head Teacher withdrew them, or if the student was re-instated by the Discipline Committee or an independent Appeal Panel.

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

- Exclusion **Type** (category, e.g. fixed period, lunchtime or permanent).
- Exclusion **Reason** (select one code to provide the main reason).
- Exclusion **Start Date**.
- Actual number of sessions (**Length**) - required for fixed period and lunchtime exclusions.
- SEN Provision (please see *Checking Special Educational Needs Information* on page 52).

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

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

Recording an Exclusion

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

2. Search for then select the required student to display the **Exclusion Details** page.

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

- Select the exclusion **Type** and the **Reason** for the exclusion from the respective drop-down lists.
- Enter the exclusion **Start Date** and **End Date** or click the appropriate **Calendar** button then select the required date.
- Select a **Start Time** and **End Time** (i.e. **AM** or **PM**) from the associated drop-down list.
- Click the **Calculate** button to populate the **Length School Days** field automatically.

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

Academic Year	Term	Start Date	End Date	Length	Exclusion Type	Exclusion Reason
Academic Year 2016/2017	Autumn Term	18/10/2016	18/10/2016	1	Fixed Term	Verbal abuse/threatening behaviour against a pupil

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

9. Click the **Save** button to save the exclusion.

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

☐ **Completed**

Preparing Termly Attendance Information

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

The attendance data collected in this return includes:

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

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

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

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

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

For information and advice about school attendance, please refer to the DfE website (<http://www.education.gov.uk/schools/pupilsupport/behaviour/attendance>).



Additional Resources:

Producing the School Census Summer 2017 Return handbook
Managing Pupil/Student Attendance handbook (SIMS Attendance users)
Monitoring Session and Lesson Attendance handbook (SIMS Lesson Monitor users)

☐ Completed

Updating Students with Top-Up Funding

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

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

Any students currently recorded as having top-up funding are displayed in the **Top-up Funding** list (located in the bottom half of the page).

Update Students with Top-up Funding

Update

Term: Summer 2017 Students On-Roll on Census Day

Surname: Forename: YTI: All Reg: All

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

Top-up Funding

Add Remove

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

04| Preparing Student Level Information

- Use the **Students On-Roll on Census Day** search criteria to locate the additional students you wish to record as having top-up funding then highlight their details.

Term: Summer 2017 Students On-Roll on Census Day

Surname: smith Forename: YTI: 8 Reg: All

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

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

Top-up Funding Add Remove

- Click the **Add** button to move the highlighted student(s) to the **Top-up Funding** list.

Term: Summer 2017 Students On-Roll on Census Day

Surname: smith Forename: YTI: 8 Reg: All

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

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

Top-up Funding Add Remove

Surname	Preferred Surname	Forename	YTI	Reg	SEN	Ever in Care
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
Smith	Smith	Trinity	8	8E	K	Yes

- 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.
- Click the **Update** button to save the data and arrange the list of students in **Surname** order.



Updating Students Post Looked After Arrangements

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

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

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

Any students currently recorded as having post looked after arrangements are displayed in the **Post Looked After Arrangements** list (located in the bottom half of the page).

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

04| Preparing Student Level Information

2. Use the **Students On-Roll on Census Day** search criteria to locate the students you want to record as having PLAA.

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

3. Highlight the required students then click the **Add** button to move the selected students to the **Post Looked After Arrangements** list.

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

4. Ensure that the correct post looked after arrangement is displayed for each student by clicking the applicable **PLAA** cell then selecting the applicable status from the drop-down list:
 - **Ceased to be looked after through Adoption**
 - **Ceased to be looked after through a Special Guardianship Order (SGO)**
 - **Ceased to be looked after through a Residence Order (RO)**
 - **Ceased to be looked after through a Child Arrangement Order (CAO).**
5. Select the **Evidence Obtained** check box, if documents have been obtained that provide evidence of the post looked after arrangements.

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

6. To remove a student from the **Post Looked After Arrangements** list, highlight the required student then click the **Remove** button. The student's record is automatically moved to the **Students On-Roll on Census Day** list, from where it can be reselected, if required.
7. Click the **Update** button to save the information and arrange the names in surname order.

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

☐ **Completed**

05| What Next?

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

The SIMS 2017 Spring Release (7.174) must be installed before completing the School Census Summer 2017 Return. However, it is advisable to check whether a later version of SIMS is available and then upgrade to the current release, if necessary, as it may include updates applicable to the forthcoming return.

You should now be ready to produce the final School Census Summer 2017 Return. For specific instructions, please refer to the *Producing the School Census Summer 2017 Return* handbook applicable to your school phase, i.e. Secondary, Middle deemed Secondary, All-Through or Pupil Referral Unit.

Where Can I Get More Information?

In addition to this preparation guide, handbooks outlining how to produce the School Census Summer Return (via **Routines | Statutory Returns | School Census**) and an Errors and Resolutions document (which provides suggestions on how to resolve any validation errors or queries) are being prepared:

- *Producing the School Census Summer 2017 Return (English Secondary/Middle deemed Secondary Schools)* handbook
- *Producing the School Census Summer 2017 Return (English All-Through Schools)* handbook
- *Producing the School Census Summer 2017 Return (English Pupil Referral Units)* handbook
- *School Census 2016/2017 Validation Errors and Resolutions* guide.

You may also find the information in the *Managing Pupil/Students* handbook useful, as it provides details about the processes that relate to the adding and editing of student data in SIMS.

These documents, together with any other useful information, e.g. news items, can be found on the My Account website (<https://myaccount.capita-cs.co.uk>) by using the search facility to find CENSUS17. Please check My Account on a regular basis because documents will be uploaded as soon as they become available.

A wide range of documentation is available from within SIMS via the **Documentation Centre** and can be accessed by clicking the **Documentation** button located at the top right-hand side of the SIMS **Home Page**. Once open, click the required category button and then select the required document.

There is a comprehensive online help system available in SIMS, accessed by clicking the applicable **Help** button or by pressing **F1** from anywhere in the software.

The My Account website (<https://myaccount.capita-cs.co.uk>) also includes a **Knowledge Base** (search by keywords or Knowledge Base ID to find answers for queries already logged with the SIMS customer support desk) and **Hot Topics** (a collections of articles from the SIMS Knowledge Base and other resources surrounding popular topical subjects, such as preparing for the new school year).

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

There is also a variety of information available, which is provided by the DfE, e.g. *School census 2016 to 2017: guide for schools and LAs* (<https://www.gov.uk/government/publications/school-census-2016-to-2017-guide-for-schools-and-las>).

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