

Summary

Primary School End of Year Procedures for the academic year 2017/18



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01/ Setting Up the New Academic Year

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Overview

This document describes the steps that should be followed to enable a successful transition from one academic year to another. It includes the creation of a new academic year, setting up next year's registration groups and year groups, etc. together with the promotion of pupil/students from one year into the next.

It is applicable to Primary school SIMS users. Secondary school users should refer to the *Secondary School End of Year Procedures*, available from the My Account website (<https://myaccount.capita-cs.co.uk>).

WARNING: *You must complete these procedures before the start of the new academic year. It is critical that the new academic year is created and promotion routines run before the old year ends. These processes determine the year groups and registration groups into which pupil/students are placed in the new academic year. We therefore suggest you start these processes as early as possible, allowing sufficient time to complete by the start of the new academic year.*

IMPORTANT NOTE: *The processes described in this document remain the same each year; they are not specific to a single academic year. The only changes made to this document each year relate to the graphical examples and the sample dates provided in the body of the text.*

In future years, if you wish to start your preparations for the next academic year before an updated End of Year Procedures document is made available, you can use the document prepared for the previous year as a guide, remembering to change the sample dates to those in the forthcoming academic year.

Setting Permissions

The permissions required to carry out the various end of year processes vary. However, users who are members of the School Administrator and Admissions Officer user groups in System Manager can carry out all the functions in this document. Please consult your System Administrator if you are unsure whether you have the required permissions.

Where to Find More Information

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

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

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

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

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

The search results are displayed automatically.

Tips for using the My Account Search Facility

Here are some key tips for using the search facility in My Account. For additional explanations, please refer to the My Account website.

- The search results can be refined further by using the advanced filters, e.g. **Sort by relevance** or **Sort by last modified**.
- The following rules can be applied to your search terms:
 - Surround a word or phrase with "double quotes" to return results containing that exact phrase.
 - Prefix a words or phrases with + to make them essential.

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

End of Year Procedure Check List

This section provides a check list of all the actions that form part of the end of year process.

Complete	Description/Task
<input type="checkbox"/>	Record changes to teaching staff in Personnel (please see <i>Recording Changes to Teaching Staff in Personnel</i> on page 4).
<input type="checkbox"/>	Create the new academic year (please see <i>Creating the New Academic Year</i> on page 8).
<input type="checkbox"/>	Set up the pastoral structure of the new academic year (please see <i>Setting up the New Academic Year's Pastoral Structure</i> on page 9).
<input type="checkbox"/>	Add intake and admission groups (please see <i>Adding Intake/Admission Groups</i> on page 11).
<input type="checkbox"/>	Import Admissions and Transfer Files, if applicable (please see <i>Importing Admissions and Transfer Files (ATF)</i> on page 11).
<input type="checkbox"/>	Import Common Transfer Files (please see <i>Importing Common Transfer Files (CTFs)</i> on page 11).
<input type="checkbox"/>	Check dates for part-time pupil/students (please see <i>Checking Dates for Part-Time Pupil/Students</i> on page 12).
<input type="checkbox"/>	Record leavers (please see <i>Recording Leavers</i> on page 12).
<input type="checkbox"/>	Export Common Transfer Files (please see <i>Exporting Common Transfer Files (CTFs)</i> on page 13).
<input type="checkbox"/>	Set up the promotion mapping for the new academic year (please see <i>Setting up the Promotion Mapping for the New Academic Year</i> on page 13).
<input type="checkbox"/>	Change the status of applications (please see <i>Changing the Status of Applications to Offered or Accepted</i> on page 17).
<input type="checkbox"/>	Allocate applicants to registration group/classes (please see <i>Allocating Applicants to Registration Groups/Classes</i> on page 17).
<input type="checkbox"/>	Print class/registration group lists (please see <i>Printing Class (Registration Group) Lists for the New Academic Year</i> on page 18).
<input type="checkbox"/>	Print OMR registration sheets for the first week of term (please see <i>In SIMS Attendance - Printing OMR Registration Sheets for the First Week of Term</i> on page 29).
<input type="checkbox"/>	Enter reasons for absence for last year (please see <i>In SIMS Attendance - Entering Reasons for Absence Last Year</i> on page 21).
<input type="checkbox"/>	Map meal charges (please see <i>Meal Charges Mapping</i> on page 22).

Complete	Description/Task
<input type="checkbox"/>	SIMS Learning Gateway (please see <i>SIMS Learning Gateway</i> on page 27).

Routines for After the New Academic Year has Started

Complete	Description/Task
<input type="checkbox"/>	Admit applicants (please see <i>Admitting Applicants</i> on page 24).
<input type="checkbox"/>	Re-admit pupil/students (please see <i>Re-Admitting Pupil/Students</i> on page 24).
<input type="checkbox"/>	Print the official register for July (please see <i>In SIMS Attendance - Printing the Official Register for July</i> on page 25).
<input type="checkbox"/>	Use the part-time pupil/students routine to add 'not required' codes (please see <i>In SIMS Attendance - Using the Part-Time Pupil/Students Routine to Add Not Required Codes</i> on page 26).
<input type="checkbox"/>	Run housekeeping routines (please see <i>Running Housekeeping Routines in SIMS</i> on page 27).

Recording Changes to Teaching Staff in Personnel

This section applies only to schools using Personnel, i.e. you are recording all staff details, including contracts, training events and absences in SIMS.

The details of new teachers joining the school should be recorded as soon as the information is available (non-teacher information can be added when known, but is not required for the end of year process). Any existing teachers who are leaving the school should be allocated a leaving date.

Adding New Teachers to Personnel

Initially, only **Basic Details** and **Employment Details** need to be entered. Further details can be added as they are known. For full instructions, please refer to the *Managing Staff* handbook.

1. Select **Focus | Person | Staff** to display the **Find Employee** browser. Click the **New** button to display the **Add Employee** page.

Add Employee

Basic Details

Surname: Forename:

Gender: Date of Birth:

2. Enter the **Surname**, **Forename**, and then select their **Gender** from the drop-down list.

3. Enter the **Date of Birth** in dd/mm/yyyy format or click the **Calendar** button to select the required date.



Calendar button

4. Click the **Continue** button. SIMS checks to see if the member of staff already exists. If no entry exists, the **Employee Details** page is populated with the data just entered.
5. Click the **Employment Details** tab to display the **Employment Details** panel.

Personal Details Professional Details **Employment Details**

Employee Details : Adrian Blacker

Save Undo Print Suspend Links

1 Employment Details

1 Employment Details

Teaching Staff ☒ Teacher Number 60/55916

Teacher Category Qualified Teacher Qualified Teacher Status Grad Teacher Program (trained in EI)

Staff Code AB Employee/Payroll No.

Employment Dates

Employment Start	Leaving Date	Cont Service Start	LA Start	Previous Employer	Next
01/09/1987		01/09/1982	01/09/1985	Brookside Comm...	

New Open Delete

Check

Check	Clearance Date	Clearance Level
DBS Check	03/09/2013	Enhanced Clearance
Health Check	12/12/2004	Satisfactory
List 99	03/06/2002	List 99 Cleared

New Open Delete

Contract

Status	Start Date	Post	Service Term	Scale Point
	01/09/2000	Headteacher	Leadership	27

New Open Delete Clone

Service Agreement

Start Date	End Date	Agreement Hours/Week

New Open Delete

6. Select the **Teaching Staff** check box for all teaching staff. This activates the **Teacher Category** drop-down list.

NOTE: It is important to identify teachers by selecting this check box as it ensures teachers are included in all applicable returns.

7. Select the required **Teacher Category** (e.g. **Qualified Teachers**) from the drop-down list.
8. Enter a **Teacher Number** if required. This must be in the format NN/NNNNN, where N represents a number, e.g. **60/55916**.
9. Select the required **Qualified Teacher Status** from the drop-down list.
10. Enter a unique **Staff Code** (up to three characters), if required.

11. Enter the **Employee/Payroll No.**, if known.
12. In the **Employment Dates** panel, create or edit a record and record the continuous service start date (**Cont Service Start**), local authority start date (**LA Start**) and **Employment Start** date, or click the respective **Calendar** buttons and select the required dates.
13. Enter the name of the **Previous Employer**, if known.
14. Add a record for a **DBS Check** in the **Check** panel by clicking the **New** button and selecting from the **Check** drop-down list. Enter the date clearance was received (**Clearance Date**) or click the **Calendar** button to select the required date.
15. Add a record for a **Health Check** in the **Check** panel by clicking the **New** button and selecting from the **Check** drop-down list. Enter the date that the questionnaire was returned (**Clearance Date**) or click the **Calendar** button to select the required date.
16. Record any additional checks, if required.
17. Click the **Save** button to add the member of staff. Repeat for any other members of staff joining the school.



Completed

Adding Leaving Dates for Existing Staff Members in Personnel

Enter leaving dates for any teachers as soon as they have left your school.

1. Select **Focus | Person | Staff** to display the **Find Employee** browser.
2. Search for and then select the required member of staff to display their details on the **Employee Details** page.
3. Click the **Employment Details** tab to display the **Employment Details** panel.
4. In the **Employment Dates** table, highlight the required record then click the **Open** button to display the **Edit Employment History** dialog.

5. Enter the **Date of Leaving** in dd/mm/yyyy format or click the **Calendar** button and select the required date.

6. Click the **OK** button to return to the **Employee Details** page.

1 Employment Details

Teaching Staff ☒ Teacher Number 94/43009

Teacher Category Qualified Teacher Qualified Teacher Status Grad Teacher Program (trained in EI)

Staff Code HA Employee/Payroll No.

Employment Dates

Employment Start	Leaving Date	Cont Service Start	LA Start	Previous Employer	Next
01/09/2009	31/08/2017	01/09/2009	01/09/2009		

Check

Check	Clearance Date	Clearance Level
CRB Check	01/09/2009	CRB Enhanced Clearance
List 99	26/08/2009	List 99 Cleared

Contract

Status	Start Date	Post	Service Term	Point/Salary

Service Agreement

Start Date	End Date	Agreement Hours/Week

New Open Delete

New Open Delete

New Open Delete

New Open Delete

7. Click the **Save** button to save the changes. Repeat for any other leavers.

 **Completed**

Creating the New Academic Year

This process defines the start and end dates for each of the school terms and half-term holidays, together with dates for public holidays and staff training days. If SIMS Attendance is in use, appropriate attendance records are created for each pupil/student on the dates entered.

IMPORTANT NOTES:

Due to the amount of processing resource required to create an academic year, whilst not essential, it is strongly recommended that all other users log out of SIMS before commencing this process. Continuing to work whilst an academic year is being created is likely to result in error messages.

Please be aware that the process may take a long time because the system creates attendance records for the new academic year.

When creating an academic year, the start date of the first term is deemed to be the first day of the academic year. This may not necessarily be the day that pupil/students arrive in school; it could be an INSET day, for example. An end date is calculated for 365 days later.

For example, if the academic year starts on 04/09/2017 then an end date of 03/09/2018 is automatically supplied.

The first day of term should be specified even if pupil/students are not in attendance.

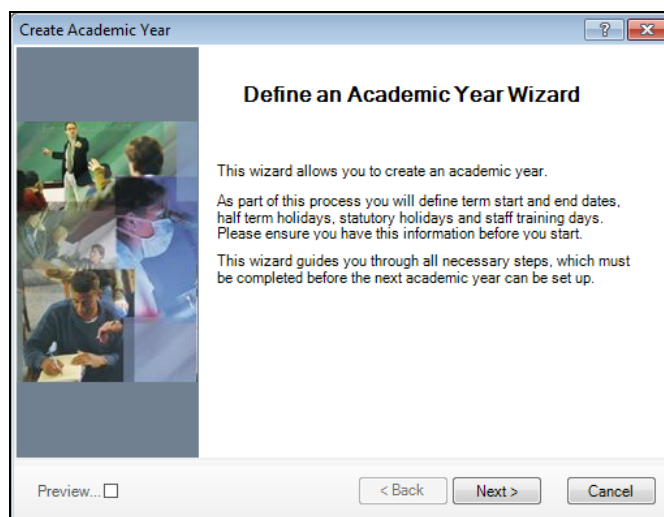
Any dates within the start and end dates of the academic year that are not term dates or training days, are considered to be holidays. This prevents the need to manually enter holidays (apart from half-terms and bank holidays).

Promotion into new year groups, etc. occurs automatically on the first day of the first term of the new academic year (providing that the promotion process has been carried out).

Before proceeding, please check that you have carried out the following:

- Recorded any changes to teaching staff (adding any new teachers and dates of leaving for any leavers).
- Ensured that you have the new academic year term dates, training days, etc. to hand.

1. Select **Routines | School | Academic Year** to display the **Create Academic Year** wizard.



2. Click the **Next** button to display the **Define the school working week** page.
3. Follow the instructions provided in the wizard, clicking the **Next** button as you complete each page:

You will need to:

- Define the school working week (which in most cases will be Monday to Friday).
- Define the school terms by entering the term dates.
- Define the half term holidays.
- Define teacher training days (this can be done at a later date via the School Diary, if preferred).
- Define public holidays such as Bank Holidays.

Setting up the New Academic Year's Pastoral Structure

The new academic year's pastoral structure is set up automatically when the new academic year is created and is based on the current academic year's structure. Therefore, you must ensure that a new academic year has been created before proceeding with the instructions in this section.

There may be occasions when the pastoral structure of the new academic year needs to be different from the current structure. For example, you may wish to:

- add additional registration group/classes, where pupil/student numbers have increased.
- merge registration group/classes, where pupil/student numbers have decreased.
- add a new year group, e.g. where a Nursery has been introduced in your school.
- change class names.

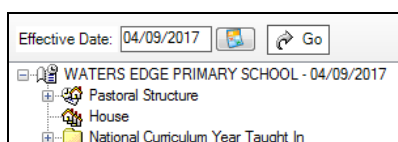
NOTES: It is not essential to assign teachers to registration group/classes at this stage. This can be done when the information is known, but must be done before the start of the academic year so that Attendance records are not affected.

If you want teachers to be promoted with their pupil/students in the next academic year, this can be achieved as part of the pastoral promotion process (please see Setting up the Promotion Mapping for the New Academic Year on page 13).

If an additional year group is required, e.g. a Nursery has been introduced to the school, this should be added before admission groups are created to ensure that the new year group is available for selection (please see Adding Intake/Admission Groups on page 11).

The next year's structure can be edited via elect **Focus | School | Pastoral Structure | Next Academic Year Structure** to display the **Next Academic Year Pastoral Structure** page.

IMPORTANT NOTE: To ensure that changes are being made for the next academic year, rather than the current academic year, ensure that the start date of the next academic year is displayed in the **Effective Date** field.



- Add any new year groups by right-clicking **Pastoral Structure** and selecting **New Year Group**. Complete the details in the **Year Group** dialog, then click the **OK** button.
- Add any registration groups by right-clicking the **Registration Group** folder and selecting **New Registration Group**. Complete the details in the **Registration Group** dialog.

*NOTE: It is strongly recommended that you check to see if the name you intend to use for a new registration group has not been previously used. This is achieved by right-clicking the required **Registration Group** folder in the pastoral structure and selecting **Reuse Old Registration Group**. A dialog is displayed listing any registration groups that have previously been deleted.*

*If the required name is listed, highlight the name and click the **OK** button to re-use the registration group rather than creating new registration group with the same name. If the required name is not listed, create a new registration group.*



Adding Intake/Admission Groups

Intake and admission groups are used to maintain lists of the applicants who have registered an interest in being taught at your school. It is now possible to create an intake group containing one or more admission groups. In a Secondary school, an intake group could be created for Year 7 with admission groups for either Feeder Schools or Registration Groups.

IMPORTANT NOTE: Please ensure that the **Date of Admission** lies within the new academic year. We recommend that the date of admission is the day on which the applicants will actually arrive in school, i.e. not a teacher training day. However, please check with your Local Authority for advice on the correct date to use if you are unsure.

If you have previously created admission groups with an incorrect **Date of Admission**, amending the date also amends the **Date of Admission** for every applicant who is a member of the group, preventing the need to edit them individually.

If you need to add a new year group but have already created intake/admission groups, you will need to create new intake/admission groups after the additional year group has been added and then move any existing members to the new intake/admission group(s).

This is also a good time to delete or make inactive any unwanted admission groups. Detailed instructions on adding and maintaining admission groups can be found in the appropriate *Admissions* handbook.

Add intake/admissions groups via **Routines | Admission | Admission Groups | Setup** and ensure that you search to see if the intake/admission group already exists before creating a new one.

Importing Admissions and Transfer Files (ATF)

If your Local Authority has provided you with an ATF file, this should have been imported around March time, as described in the appropriate *Admissions* handbook. Any additional pupil/students can be imported via CTF, as described in the following section.

Importing Common Transfer Files (CTFs)

Import any CTFs that have not yet been imported. Pupil/Students with CTFs can be imported into an admission group or directly on-roll.

For more information on changing the status of the application from **Applied** to **Offered**, please refer to the appropriate *Admissions* handbook.

☐ Completed

Checking Dates for Part-Time Pupil/Students

To ensure that pupil/students who are no longer part-time are showing correctly in Attendance, it is necessary to enter an end date in their part-time details in SIMS and to change their attendance mode to all day. This is mostly relevant to Nursery schools (or schools with nursery age children). However, any pupil/student can be marked as part-time if their attendance is anything less than 10 sessions per week.

Check details via **Focus | Pupil (or Student) | Pupil (or Student) Details**, select the **Registration** panel then check or amend the **End Date** in the **Part Time Details** section.

Once you have determined which pupil/students are part-time (i.e. which pupil/students are AM only or PM only), you need to define the part-time sessions and dates for the AM/PM groups for all or part of the coming year. Running this routine will also ensure that pupil/students who are no longer part-time will have their attendance records amended accordingly (please see *In SIMS Attendance - Using the Part-Time Pupil/Students Routine to Add Not Required Codes* on page 26).



Completed

Recording Leavers

This section provides a summary of the steps required to record leaver information in SIMS.

The facility to record leavers enables accurate records to be kept of pupil/students after they have left the school. During the Summer term you will need to mark most, or all of the pupil/students as leaving on the same day. You should only mark pupil/students as leavers if you are sure they are leaving, e.g. Year 6 pupil/students moving on to Secondary school.

IMPORTANT NOTES: *It is essential that you do not record leavers by removing their date of admission as this affects all historical data relating to that pupil/student.*

If someone who was a leaver subsequently returns, please ensure that you re-admit them – do not simply remove the date of leaving as this will affect the history (unless they had a date of leaving, but did not actually leave, i.e. changed their minds).

To ensure that information required for statutory returns, such as the School Census, is accurate and up-to-date, it is recommended that you check that all leavers have at least the minimum statutory information recorded before making them a leaver, e.g. Ethnicity.

This is achieved via **Routines | Pupil (or Student) | Leavers**.



Completed

Exporting Common Transfer Files (CTFs)

Common Transfer Files can be created and sent to other schools or Local Authorities.

*NOTE: Before proceeding, you must have previously added any required **Feeder** and **Destination Schools** via **Tools | Other Schools** and specified the directory into which the CTF export will be saved via **Tools | Setups | CTF**.*

*Please ensure that the relevant pupil/students are given a **Date of Leaving** before exporting the CTF.*

For more information on Exporting a CTF, please refer to the *Importing and Exporting CTFs* chapter in the *Managing Pupil/Students* handbook.



Completed

Setting up the Promotion Mapping for the New Academic Year

Setting up the promotion paths for the pastoral structure plays a key part in the end of year procedures and ensures that pupil/students move from their current year group and class into the correct year group in the new academic year. This process is used to set the path for year groups and classes, but it is also possible to specify a promotion path for individual pupil/students in case there are any exceptions.

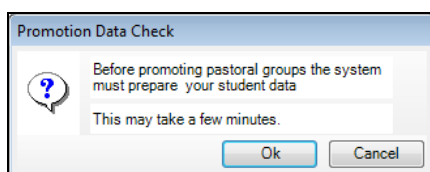
Setting the promotion mapping can be carried out at any point, as the promotion itself occurs at the beginning of the next academic year. However, it must be done before the start of the academic year.

You can repeat the process a number of times until you are happy that all pupil/students have been mapped to the appropriate classes.

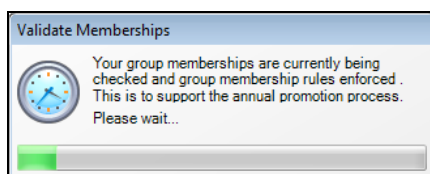
BEFORE PROCEEDING: Please check that you have carried out the following:

- Recorded any changes to teaching staff (added new teachers and added dates of leaving for any leavers).
- Created the new academic year.
- Amended your pastoral structure as required, such as adding new classes.

1. Select **Routines | School | Promotion** to display the **Promotion Data Check** dialog. You are advised that pupil/student data needs to be prepared (all current group memberships are checked and confirmed).



2. Click the **Ok** button to display the **Validate Memberships** message dialog, which shows the progress of the validation process.



This process may take some time to complete. Once the validation process is complete, the **Setup Promotion Mapping** dialog is displayed.

3. The current academic year should be selected automatically from the **Promote from** drop-down list. If it is not selected automatically, select it from the drop-down list then click the **Load** button.

WARNING: It is imperative that you select the correct academic year otherwise any changes made will affect the wrong year and it will be very difficult to rectify.

4. The **Year Group** panel is populated with a default set of promotion paths (where one year is promoted to the next, i.e. Year 1 is promoted to Year 2 and so on). This is the same for both vertically or horizontally structured schools. If you wish to return to this setting at any point in the future, click the **Set Default** button.
5. Change the promotion path if required, by clicking the required year group in the **Promotion Path** column then selecting the required year from the drop-down list.

NOTE: Schools that have a year group **N1** must ensure that this is mapped to **N2**.

Setup Promotion Mapping from Academic Year 2016/2017

Academic Year:
Promote from: Academic Year 2016/2017 Load

Year Group

Year Group	Promotion Path
N1	
N2	R
R	1
1	2
2	3

Override membership ☐ Set Default

Class

Year	Registration Group	Promotion Path	Registration Tutor	Promote Registration Tutor	Promote Other Supervisors
Year N1	N1 AM		Ms Lisa Lawson	<input type="checkbox"/>	<input type="checkbox"/>
Year N1	N1 PM		Mrs Rebecca Lorrin	<input type="checkbox"/>	<input type="checkbox"/>
Year N2	PM		Ms Lisa Lawson	<input type="checkbox"/>	<input type="checkbox"/>
Year N2	AM		Mrs Rebecca Lorrin	<input type="checkbox"/>	<input type="checkbox"/>
Year R/Yea..	ELM		Mr Richard Perrin	<input type="checkbox"/>	<input type="checkbox"/>
Year R/Yea..	PINF		Mr Oliver Jovner	<input type="checkbox"/>	<input type="checkbox"/>

Override membership ☐ Finish

If your school has a vertical structure, the years are displayed the same in the **Year** column as they are displayed in the following example.

Year	Registration Group	Promotion Path	Registration Tutor	Promote Registration Tutor	Promote Other Supervisors
Year N1	N1 AM		Ms Lisa Lawson	<input type="checkbox"/>	<input type="checkbox"/>
Year N1	N1 PM		Mrs Rebecca Lorrin	<input type="checkbox"/>	<input type="checkbox"/>
Year N2	PM		Ms Lisa Lawson	<input type="checkbox"/>	<input type="checkbox"/>
Year N2	AM		Mrs Rebecca Lorrin	<input type="checkbox"/>	<input type="checkbox"/>
Year R/Yea..	ELM		Mr Richard Perrin	<input type="checkbox"/>	<input type="checkbox"/>
Year R/Yea..	PINF		Mr Oliver Jovner	<input type="checkbox"/>	<input type="checkbox"/>

To facilitate the identification of year group names, drag the dividing line of the column heading to increase the size of the **Year** column.

- Review the promotion path for each class. The **Class** panel displays a list of the classes for the current academic year. Move down one class at a time by clicking in the **Registration Group** column then select the class to which the pupil/student will be promoted from the **Promotion Path** column drop-down list. Repeat this process for all the classes in the **Class** panel.
- The **Registration Tutor** column displays the name of the current class tutor. If you want the tutor of the class to be promoted into the next academic year with the class, select the **Promote Registration Tutor** check box.

8. If any existing Classroom Assistants or Learning Support Assistants should be promoted into the next academic year with the class, select the **Promote Other Supervisors** check box.
9. Select the **Override Membership** check box in both the **Year Group** and **Class** panels the first time you carry out the promotion mapping process. This ensures that any existing memberships (however they were defined) are overwritten. If you repeat the promotion process, you can decide whether to overwrite the existing memberships by selecting the check box as required. For example, if you had originally stated that pupil/students in the **Pine** class should be promoted to the **Ash** class and subsequently wanted them to go from **Pine** to **Oak**, you would need to select the **Override Membership** check box in the **Class** panel.

IMPORTANT NOTE: If you already carried out this process to set up your mappings and you now wish to edit them, please ensure that the **Override Membership** check box is not selected if you wish to retain your previous settings.

10. Click the **Finish** button and then **Save** the settings.
 11. Click the **Map** button on the toolbar at any point to return to the **Setup Promotion Mapping** dialog.
- SIMS displays the **Promote Pastoral Groups** page, which lists the current year groups.

Name	Unusual	Current Year Group	Next Year Group	Current Registration Group	Next Registration Group
+ Current Year Group: N2					
+ Current Year Group: R					
+ Current Year Group: 1					
+ Current Year Group: 2					
+ Current Year Group: 3					
+ Current Year Group: 4					
+ Current Year Group: 5					
+ Current Year Group: 6					

Checking the Registration Tutors Assigned

Once the promotion mapping process is complete, you are strongly advised to check the registration group assignments in the pastoral structure via **Focus | School | Pastoral Structure | Next Academic Year Structure**.

Expand the structure and check each registration group by right-clicking and selecting **Properties**. If necessary, add/amend the registration tutor. If you have two registration tutors sharing the group, add the other registration tutor as a Supervisor, ensuring that you select the **Role** of **Joint Main Supervisor**.

 **Completed**

Changing the Status of Applications to Offered or Accepted

Once applicants have been added to SIMS (manually or by importing CTFs/ATFs), you will need to change the applications status to either **Offered** or **Accepted**. This is done via **Routines | Admissions | Finalise Offers | Admissions | Accept Applications**. For more information, please refer to the *Managing Applications to your School* chapter in the *Managing Pupil/Students* handbook.

Allocating Applicants to Registration Groups/Classes

Before allocating applicants to classes, you must have:

- added the applicants by clicking the **Application** icon on the toolbar or selecting **Focus | Admission | Application**, or imported via ATF or CTF.



Application icon

- changed the applicant's application status (please see *Changing the Status of Applications to Offered or Accepted* on page 17) to **Offered** or **Accepted**.
- Select **Focus | School | Pastoral Structure | Next Academic Year Structure** to display the **Next Academic Year Pastoral Structure** page.
 - Right-click the applicable **Registration Group** folder and select **Members** from the pop-up menu to display the **Allocate Students/Applicants** dialog.

Effective Date Range

☒ From effective date to end of the academic year (☐ Over the whole academic year (04/09/2017 - 03/09/2018)

Student Status

☒ Students ☒ Accepted Applications ☒ Current Applications (Applied / Offered / Reserved)

Members Print Actions

Name	Gender	Year Group	Reg Group	PM	AM
Abhra, Abjit	Male	Year N2	AM		✓
Abhra, Alisha	Female	Year N2	PM	✓	
Abhra, Neel	Male	Year N2	PM	✓	
Ackton, Stan	Male	Year N2	AM		✓
Beiber, Justin	Male	Year N2	AM		✓
Berkley, Jack	Male	Year N2	PM	✓	
Del Sonno, Nadia	Female	Year N2	AM		✓
DiCalvi, Pasquale	Male	Year N2	AM		✓
DiMichele, Sara	Female	Year N2	PM	✓	
Ebi, Danesh	Male	Year N2	PM	✓	
Enlai, Cheng	Male	Year N2	PM	✓	
Total				10	10

OK Cancel

- Select the required class for each applicant in the grid by clicking the appropriate cell to display a tick. Clicking the cell again removes the tick.

4. Once you have selected classes for each the applicants, click the **OK** button to save the changes.



Completed

**More Information:**

Changing the Status of Applications to Offered or Accepted on page 17

Printing Class (Registration Group) Lists for the New Academic Year

Class (Registration Group) lists can be easily produced using any of the following pre-defined reports:

- Registration Groups (Dated)
- Registration Groups (Dated – DOB Sort)
- Registration Groups (Dated – Gender Sort)
- Registration Groups (Dated with Columns).

If these reports do not exist on your system, you need to import the latest pre-defined reports. For more information, please refer to the *Designing and Running Reports* handbook.

Use the **Effective Date** to enter a date in the new academic year, e.g. 04/09/2017 to produce lists for the new academic year.

Registration Groups (Dated) Report

Registration Group: 4DT		
Tutor:	Ms D E Turnball	
Room:	n/a	
Effective date:	04/09/2017	
Name	Gender	Date of Birth
Abdullah Tamwar	M	12-01-2009
Abhra Abjit	M	20-11-2008
Abhra Alisha	F	20-11-2008
Berkley Jack	M	22-11-2008
Beynon Harvey	M	15-02-2009
Carter Danielle	F	04-04-2009
Cassidy Michael	M	02-01-2009
Cedric-Smith Lucie	F	08-05-2009
Ciprio Alicia	F	24-05-2009
Clarke Matthew	M	16-01-2009
Danes Tilly	F	22-01-2009
Davies Katherine	F	02-12-2008
Ghio Imhan	M	04-04-2009
Harvey Georgia	F	09-12-2008
Jones Robin	M	26-04-2009
Mitchell Laura	F	26-03-2009
Ricci Antonio	M	27-07-2009
Williams Eloise	F	04-11-2008
Total: Males 9		
Total: Females 9		
Group Total:		18

Registration Group (Dated – DOB Sort)

As per the Registration Groups (Dated) report but in Date of Birth order.

Registration Group (Dated – Gender Sort)

As per the Registration Groups (Dated DOB Sort) report but in Gender order.

Registration Group (Dated – With Columns)

As per the Registration Group (Dated) report but with five additional blank columns.

☒ Completed

02/ Processes to be Carried Out in Other SIMS Modules

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In SIMS Attendance - Entering Reasons for Absence Last Year

If you are using OMR Absence sheets, read the sheets in via **Routines | Attendance | OMR Entry | Read OMR Absence Sheets**.

If you are using Edit Marks (via **Focus | Attendance | Edit Marks**), put the date back in the **Week Beginning** field to the required date, then click the **Search** button.

Double-click the required class to display marks for the chosen group(s) then edit as required. Selecting the **Show only students with Unexplained Absences today** check box may speed up this process.

Edit Session Marks - W/b 13/03/2017 - N1 AM

Save Undo Print Refresh Codes Preserve Minutes Late Comments Vertical Link Help Unpin Close

Previous Week Next Week Select All Show only students with Unexplained Absences today

Attendance Dinner Register

Name	Reg	Interventions	Mon 13/03		Tue 14/03		Wed 15/03		Thu 16/03		Fri 17/03	
			AM	PM	AM	PM	AM	PM	AM	PM	AM	PM
Abhra, Shaquib	N1 AM	/	x	/	x	/	x	/	x	/	x	
Martin, Araminta	N1 AM	/	x	/	x	/	x	/	x	/	x	
McCann, Austin	N1 AM	/	x	/	x	/	x	/	x	/	x	
Patterson, Tiffany	N1 AM	/	x	/	x	/	x	/	x	/	x	

☒ Completed

Academic Management (Primary Curriculum) End of Year Processes

The Primary Curriculum module is a tool that allows schools in the Primary sector to create teaching groups by combining and re-allocating pupil/students from different classes or years, or by dividing up the pupil/students of a single class. If you have created teaching groups for the current academic year using Primary Curriculum and wish to use a similar system next year, you need to recreate these groups for the new academic year. Unlike the Pastoral Structure, academic structures are bound to specific Academic Years. So even if next year's Literacy sets look exactly like the ones in use this year, they must in fact be a different set of teaching groups, and defined within a new 'scheme'. This can be done at any point either before or after the new academic year begins, but after the promotion path has been created. The groups created within previous academic years can still be accessed by changing the academic year selected via **Tools | Academic Management | Set Academic Year**.

1. In order to create or edit teaching groups for an academic year other than the current one, select the required academic year via **Tools | Academic Management | Set Academic Year**.
2. Create new curriculum schemes and within them, the required teaching groups via **Focus | School | Academic Structure | Edit Curriculum Structure**.
3. Allocate pupil/students to their teaching groups via **Focus | School | Academic Structure | Curriculum Assignment by Scheme**. This needs to be done after pupil/students have been allocated to their new registration groups, using the promotion path.

The process of creating teaching groups is described in detail in the *Academic Management for Primary Schools* handbook. A Quick Start Guide is also provided as an appendix in the same handbook.

Dinner Money

There are no end of year processes in Dinner Money. However, it is advisable to reconcile pupil/student and staff balances, issue refunds or collect debts (where possible) before the end of term, particularly for any pupil/students or staff who are leaving the school.

You may choose to print off a copy of the Pupil Balances and Staff Balances reports (via **Reports | Dinner Money | Finance | Pupil (or Staff) Balances**) from the date of your opening balances in Dinner Money to the last working day of the current academic year as a record of opening balances, all meals taken, transactions and balances at the year end.

Meal Charges Mapping

Tools | Dinner Money | Setup

Please be aware of the following, in cases where schools have mapped meal charges to classes/registration groups, rather than to either Tiers or Year groups (as the latter two are less likely to change).

It is not possible to change the meal charges mapping from, for example, classes to year groups. If schools change their class names in September, but simply rename the old class names, the existing meal definitions will continue to work with the new names.

If schools create new classes and make old classes inactive, in September an error message will be displayed when trying to enter payments because any meals recorded in the new classes will not be mapped to the existing meal definitions. Also, schools will not be able to add the new classes to the existing meal definitions/charges because the meals will have already been recorded (even if they try to delete the recorded meals).

To prevent this issue occurring, you must either:

- Create new meal definitions for the new classes, adding the meal price (with a start date before the start of term) and selecting all the new classes. This will need to be done for all active meal types, including Absent, Other School, etc. The disadvantage of this is that in future schools will need to add price changes to both meal definitions, to cover all classes.
- or
- Give all current meal charges an end date in the existing meal definitions, e.g. 31/08/2017. Enter a new meal definitions, with meal charges having a start date of, e.g. 01/09/2017 and select all classes listed. You can carry on using the existing meal types, as long as the charge dates do not overlap in the meal definitions. Then append the name of the old meal definitions to include, e.g. 'Inactive'.

This must be done before the start of the new academic year.

If the new year has already started and schools have recorded meals, you can create temporary meal types and definitions for the new classes and use these to re-record the meals for the affected dates. Give all current meal charges an end date in the existing meal definitions, e.g. 31/08/2017. Enter a new meal definitions, with meal charges having a start date of, e.g. 01/09/2017 and select all classes listed. You can carry on using the existing meal types, as long as the charge dates do not overlap in the meal definitions. Then append the name of the old meal definitions to include, e.g. 'Inactive'.

After the New Academic Year has Started

The following routines should be undertaken once the new academic year has been started.

- In SIMS, admit applicants (please see *Admitting Applicants* on page 24).
- In SIMS, record any re-admission pupil/students (please see *Re-Admitting Pupil/Students* on page 24).
- In Attendance, print the official register for July (please see *In SIMS Attendance - Printing the Official Register for July* on page 25).
- In Attendance, use the Part-Time Pupil/Students routine to add Not Required codes (please see *In SIMS Attendance - Using the Part-Time Pupil/Students Routine to Add Not Required Codes* on page 26).

Admitting Applicants

Applicants should be admitted on the first day that they actually arrive at the school. If however, you have been contacted by a parent who explains why their child will not be able to start on the specified date, you can agree a new start date for that applicant.

*NOTE: Guest pupil/students will be admitted and a pupil/student record created. They will not have an admission number (because they are a guest) and therefore, will not appear on-roll. They can be selected from the **Find Pupil (or Student)** browser (via **Focus | Pupil (or Student) | Pupil (or Student) Details**) by selecting **Guest** from the **Status** drop-down list.*

For more detailed instructions, please refer to the appropriate *SIMS Admissions Code of Practice* handbook.

To admit applicants, select **Routines | Admission | Admit Applications** to display the **Find Intake Group** browser.



Re-Admitting Pupil/Students

This section contains a summary of the required steps. For detailed instructions, please refer to the appropriate *Admissions* handbook.

Any pupil/students who have left your school and then subsequently return, must be re-admitted rather than added to the system again. This ensures that the pupil/student's educational **History** is maintained.

IMPORTANT NOTES: *It is essential that you follow this process for re-admissions (i.e. for pupil/students who have left your school and subsequently return). Do not remove the **Date of Leaving** as a method of re-admitting. However, if the pupil/student was originally leaving and changes their mind, i.e. they do not actually leave, then you should remove their **Date of Leaving**.*

*It is perfectly acceptable for there to be a gap between the date of leaving and the date of return and this will be reflected in SIMS if it is the case (for example, if the pupil/student leaves in July but returns in September). If you do not want any gaps in the associated class memberships, then you will need to edit the history via **Focus | Pupil (or Student) | Pupil (or Student) Details** page by clicking the **History** button in the **Registration** panel.*

1. Select **Focus | Pupil (or Student) | Pupil (or Student) Details** to display the **Pupil (or Student) Details** page.
2. Click the **New** button to display the **Add Student** page.
3. Enter the pupil/student's known details into the **Basic Details** panel then click the **Continue** button. A list of **Matched People** matching the search criteria entered is displayed.

4. Highlight the required pupil/student and click the **Open** button to display a warning message **The selected pupil/student is a Leaver, do you want to re-admit the Pupil/student?**.
5. If you are certain that this is the pupil/student who should be re-admitted, click the **Yes** button to display the pupil/student's details.
6. Add/edit further details as required, then click the **Save** button. All mandatory fields are highlighted in red and must be completed before you are able to finally save the pupil/student's details.
7. Click the **Save** button again if any additional data has been added.



Completed

In SIMS Attendance - Printing the Official Register for July

Before printing the official register for July, you should deal with missing marks and add reasons for absence for the month you are going to print.

1. Select **Reports | Attendance | Whole Group Pupil Reports | Official Register Report** to display the **Official Register Report** page.

Short Name	Description
N1 AM	N1 AM
N1 PM	N1 PM
PM	PM
AM	AM
ELM	ELM
PINE	PINE
ASH	ASH
OAK	OAK
2JB	2JB
2GH	2GH
3TO	3TO
3CB	3CB
4ES	4ES
4SL	4SL
5BB	5BB
5DT	5DT

2. Highlight the required group(s), using **Ctrl** or **Shift** to highlight multiple groups. Click the **Print** button to produce the required reports.



Completed

In SIMS Attendance - Using the Part-Time Pupil/Students Routine to Add Not Required Codes

The sessions when part-time pupil/students, i.e. pupil/students of non-statutory school age, are not required to attend school can be specified using this routine. SIMS then applies the Non-compulsory school-age absence code (X) to the sessions that occur during the specified date range. The Week Range dates must lie within the new academic year and we would advise that you use the working academic year dates as explained in the following example.

The part-time pupil/student functionality is available via a dedicated menu route (**Tools | Setups | Attendance Setup | Part Time Pupils**). To ensure that the dedicated menu route is available, select the Show **Part-time Pupils** check box in the **Visibility Switches** panel.

1. Select **Tools | Setups | Attendance Setup | Part Time Pupils** to display the **Part Time Pupils** page.

2. Specify the date range appropriate to the period for which your chosen group will be part-time. The dates must lie within the academic year.
3. Highlight the required groups (using **Ctrl** or **Shift** to highlight multiple groups). The **Select All** and **Deselect All** button can also be used if required.
4. Specify when attendance is required by selecting one of the radio buttons.

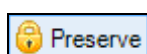
- Attendance required in mornings only
- Attendance required in afternoons only

- Attendance required all day
Select this option when a part-time pupil/student starts full-time school. All 'Not Required' codes for the pupil/student are removed from the system.
- Apply a weekly pattern of Not Required codes
Select this option if a mixture of AM and PM sessions is required. The associated grid is then enabled. Select the check boxes that represent the sessions when the pupil/students are not required to attend school.

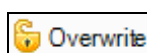
In the following example, the pupil/students are expected to attend Monday, Tuesday, Thursday and Friday morning, and all day on Wednesday.

	Mon AM	Mon PM	Tue AM	Tue PM	Wed AM	Wed PM	Thu AM	Thu PM	Fri AM	Fri PM
I	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

- Existing marks can be protected or overwritten. This is achieved by clicking the **Preserve/Overwrite** toggle button.



Preserve toggle button



Overwrite toggle button

*NOTE: If the **Overwrite** button is selected, SIMS saves the specified pattern of marks (overwriting any existing marks), for all sessions in the selected range of weeks.*

- Click the **Apply** button to apply the codes to the selected part-time pupil/students.

Running Housekeeping Routines in SIMS

Now is a good time to carry out some general housekeeping routines in SIMS. For more information, please refer to the *Setting Up and Administering SIMS* handbook.

SIMS Learning Gateway

This section applies only to SIMS Learning Gateway users

- Create and distribute SIMS Learning Gateway accounts for new staff, pupil/students and parents.
- Remove access to SIMS Learning Gateway from leavers, the parents of leavers (where they have no other children at the school), and staff who have left.

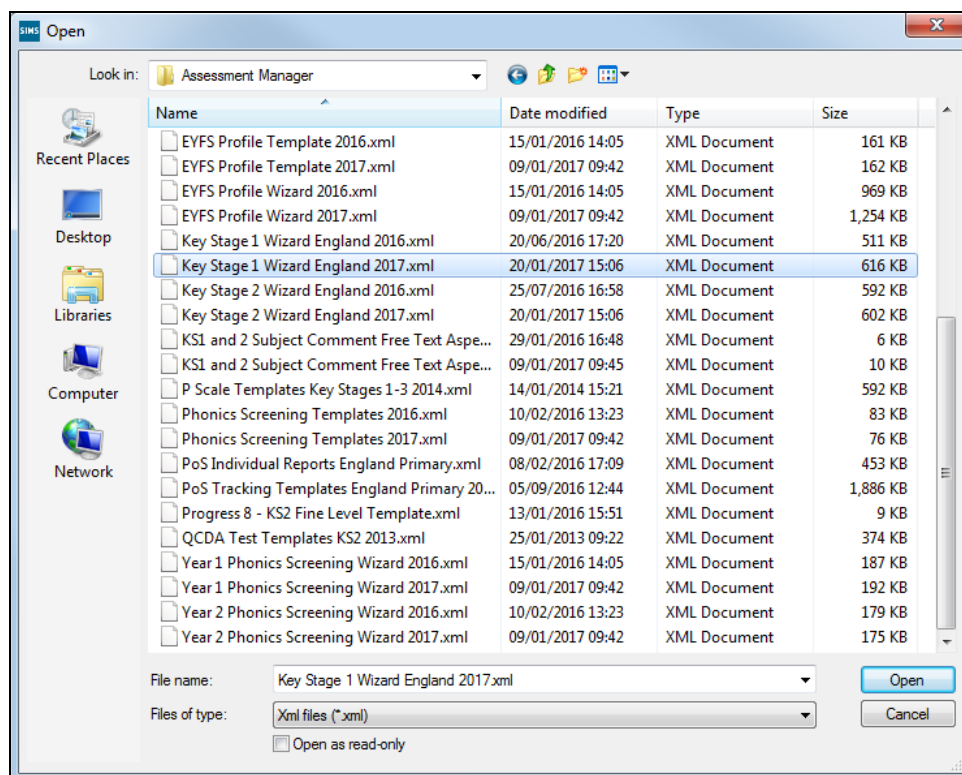
For full instructions, please refer to the *Removing Provisioned Users* chapter in the *Active Directory Provisioning Service for Administrators* handbook.

Importing the Key Stage Wizard

If you would like to import the assessment components of your new pupil/students via CTF, you will need to import the relevant Key Stage wizard(s) into SIMS Assessment before importing the CTF.

02/ Processes to be Carried Out in Other SIMS Modules

1. In SIMS, select **Routines | Data In | Assessment | Import** to display the **Import** wizard.
2. Click the **Field Browser** button adjacent to the **Select the file to import from** field. Navigate to C:\Program Files\SIMS\SIMS .net\AMPA. Double-click the folder relevant to your school, then double-click the Assessment Manager folder.



3. Highlight the relevant wizard XML file, e.g. Key Stage 1 Wizard England 2017.XML, then click the **Open** button.
4. The name of the selected file is displayed in the **Select the file to import from** field. Any header comments that were added to the file when it was created for export are displayed.
5. Select the **Overwrite with default values** check box if you want to update the column headings.
6. Click the **Finish** button then the **Yes** button to start the import process. This may take several minutes. An Activity Log is displayed when the import is complete. Click the **Close** button.

Archiving Attendance Marks

To improve the performance of SIMS when viewing and editing attendance marks, session marks can be archived via **Tools | Housekeeping | Archive Attendance Marks | Archive**. All marks, with the exception of those recorded in the current academic year and the preceding academic year, can be archived.

NOTE: Attendance marks cannot be edited once archived.

For further information on archiving attendance marks, please refer to *Archiving Attendance Marks* in the *Housekeeping Routines* chapter of the *Managing Pupil/Student Attendance* handbook.

In SIMS Attendance - Printing OMR Registration Sheets for the First Week of Term

1. Select **Routines | Attendance | OMR Entry | Print OMR Registration Sheet** to display the **Print OMR Registration Sheet** page.

Short Name	Description
N1 AM	N1 AM
N1 PM	N1 PM
PM	PM
AM	AM
ELM	ELM
PINE	PINE
ASH	ASH

2. Highlight the required group(s) using **Ctrl** or **Shift** to highlight multiple groups. Click the **Print** button to produce the required registration sheets.

 **Completed**



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

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

