

Applicable to 7.176 onwards Producing the School Census Autumn 2017 Return

English Special Schools



C Contents

| 01 Introduction1 | |
|---|--|
| Overview1 | |
| How has the School Census Autumn Return Changed since Last Year? | |
| Steps to Producing the School Census Return | |
| Where to Find More Information5 | |
| 02 Preparing for the School Census Autumn Return | |
| Setting Permissions7 | |
| What Version of SIMS is Required?7 | |
| Preparing Data for the School Census Return | |
| 03 Producing the School Census Autumn Return 11 | |
| Creating a New School Census Return11 | |
| Configuring the Census Folder12 | |
| Specifying the Security Message for Reports | |
| Editing Census Details14 | |
| Calculating All Details14 | |
| Editing School Information15 | |
| Information for Academies16 | |
| Updating Early Years Data16 | |
| Adding/Editing Early Years Data18 | |
| Identifying which Children have no Hours Recorded | |
| Updating Pupil/Students with Top-Up Funding | |
| Editing Pupil/Students Post Looked After Arrangements | |
| Managing School Dinners Taken on Census Day | |
| Using Dinner Money to Calculate School Dinners Taken on Census Day | |
| Using Attendance to Calculate School Dinners Taken on Census Day | |
| Using Manual Entry to Record School Dinners Taken on Census Day | |
| Entering Attendance Information | |
| SIMS Attendance/Lesson Monitor Users | |
| SIMS Attendance/Lesson Monitor Not in Use | |
| 04 Completing the School Census Autumn Return | |
| Creating and Validating a School Census Return | |
| Resolving Validation Errors and Checking Queries | |
| Producing Detail Reports 40 | |

| Deleting an Unauthorised Return | |
|---|----|
| Copying a Return | |
| Retrieving Authorised Census Return Files | 50 |
| Submitting the Return | 50 |
| Authorising the Return | |
| Editing an Unauthorised Return | |
| Generating the Summary Report | |
| Producing the Summary Report | |
| Deleting the cache in Internet Explorer 8 and 9 | |
| Deleting the cache in Internet Explorer 10 | |
| Deleting Temporary Web Browser Files | |
| Transferring Report Data to a Spreadsheet | |
| Printing a Report from your Web Browser | |
| Generating Detail Reports | |

01 Introduction

| Overview | 1 |
|---|---|
| How has the School Census Autumn Return Changed since Last Year? | 2 |
| Steps to Producing the School Census Return | 4 |
| Where to Find More Information | 5 |

Overview

This handbook provides the information needed by Special schools in England to complete the School Census Autumn 2017 Return, which this year takes place on Thursday 5 October.

The School Census Autumn Return is required to be completed by maintained Nursery schools, Primary schools, Middle schools, Secondary schools, All-Through schools, Special schools, Pupil Referral Units (PRUs), City Technology Colleges (CTCs) and Academies (including free schools) in England. Non-maintained Special schools are also required to submit the return.

Currently, there are three School Census returns each year (i.e. Spring, Summer and Autumn), which collect detailed information about school characteristics and pupil/students. Different data is collected depending on which return is being prepared, and your school phase.

A list of items collected from Special schools in England for the School Census Autumn 2017 is available in a later section of this handbook (please see *Preparing Data for the School Census Return* on page 8).

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

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

Changes to the School Census Autumn Return include the following: Census day: 05/10/2017 Attendance data collected from 17/04/2017 to 31/07/2017 Exclusions data collected from 01/01/2017 to 16/04/2017 FSM (Free School Meal) data collected from 19/05/2017 to 05/10/2017.

Changes to Early Years

Applicable to schools with early years children only

Tools | Statutory Return Tools | Update Early Years Routines | Statutory Returns | School Census

Disability Access Fund

This new option provides the ability to record whether three- and four-year-old pupils are in receipt of the **Disability Access Fund**.

30 Hour Code

This new option provides the ability to record the 11 digit **30 Hour Code** for three and four-year-old pupils.

Extended Funded Hours

This new option provides the ability to record the number of **Extended Funded Hours** that are in addition to the initial funded hours that the child receives.

Hours and Minutes Format

Values for Funded Hours, Hours at Setting and Extended Funded Hours can now be entered in hours and minutes using two decimal places, e.g. 1 hour 15 minutes should be entered as 1.25.

NOTE: **Disability Access Fund, 30 Hour Code** and **Extended Funded Hours** for pupils aged two at 31/08/2017 are <u>not</u> collected in the School Census return.

More Information:

Adding/Editing Early Years Data on page 18

Report Dictionary Changes

Reports | Design Report – Student – Additional Information

Three new columns have been added to the report dictionary:

- Extended Funded Hours
- 30 Hour Code
- Disability Access Fund Indicator.



Additional Resources:

Designing and Running Reports handbook

Early Years Attendance

Tools | Setups | Attendance Setup | Early Years Provisions Setup

The provision **Start Time** and **End Time** are no longer restricted to half an hour intervals.



Additional Resources:

Managing Pupil/Student Attendance handbook

Update Hours

Tools | Statutory Return Tools | Update Early Years Routines | Statutory Returns | School Census

Hours and minutes are now calculated to two decimal places, provided Early Years Provisions are in use.

More Information: Updating Early Years Data on page 16

Early Years Report

Routines | Statutory Returns | School Census

This new report displays information regarding hours at setting, funded hours, 30 hour code, extended funded hours and disabled access fund for pupils with early years data only.



More Information:

Early Years Report on page 43

On Roll Basic Details Report

Routines | Statutory Returns | School Census

This existing report no longer displays hours at setting, funded hours and proficiency in English.



More Information:

On Roll Basic Details Report on page 40

Establishment Unique Reference Number

Focus | School | School Details

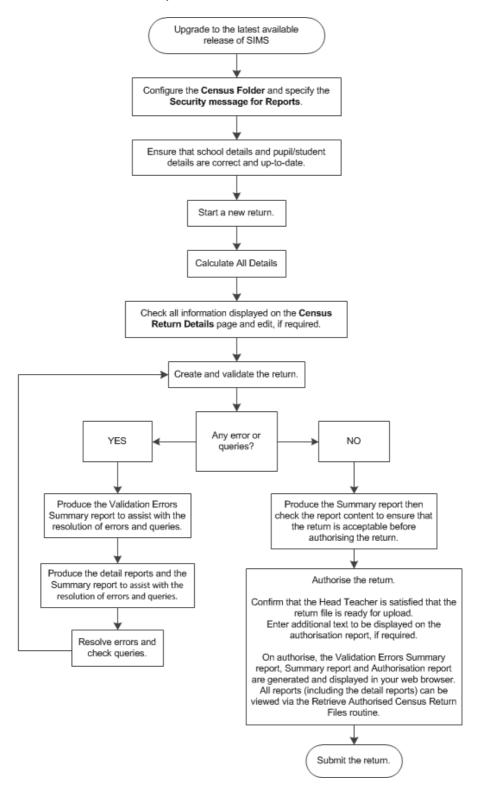
The school's **Unique Reference Number** (URN) is collected for the first time in the Autumn return.



More Information: Editing School Information on page 15

Steps to Producing the School Census Return

The process of producing the School Census can be separated into a number of steps, some of which might need to be repeated in order to eliminate validation errors and queries.



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.

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

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

The search results are displayed automatically.

Tips for using the My Account Search Facility

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

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

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

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

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

02 Preparing for the School Census Autumn Return

| Setting Permissions7 | / |
|---|---|
| What Version of SIMS is Required? | 7 |
| Preparing Data for the School Census Return | 3 |

Setting Permissions

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

Producing the Return

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

Editing and Preparing Data

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

- Administration Assistant
- Admissions Officer
- School Administrator.

Importing Revised Files

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

- Returns Manager
- System Manager.

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.

What Version of SIMS is Required?

To run the return, you must have the SIMS 2017 Summer Release (7.176) 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 7.176 or later.

02| Preparing for the School Census Autumn Return



Preparing Data for the School Census Return

Before beginning the process of producing the return, it is advisable to spend time ensuring that all school level and pupil/student level information is present and accurate in SIMS. For example, ensure that school details are correct, all new pupil/students have been added to SIMS, all leavers have been recorded and where applicable all exclusions have been recorded, etc.

The following information is collected from Special schools for the School Census Autumn 2017 Return.

School Level Data

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

Pupil/Student Level Data

- Pupil/Student Identifiers: unique pupil number (UPN) and former UPN, unique learner number (ULN), surname, forename, middle names, former surname, preferred surname, date of birth and gender.
- Characteristics:
 - language code, nationality, country of birth.
 - post looked after arrangements.
 - school dinner taken (applicable to schools with pupil/students in Reception, Year 1 and Year 2. Also, pupil/student in Year Taught In X (those not following the National Curriculum) who are aged four to six and who were born between 01/09/2010 and 31/08/2013 inclusive).
 - free school meal eligibility (19/05/2017 to 05/10/2017): start date, end date and UK country in which the eligibility applies
 - top-up funding indicator, funded hours, extended childcare hours, 30 hour code, disability access fund indicator and hours at setting
 - Youth Support Services Agreement (YSSA) indicator, full-time employment indicator.
- Status: enrolment status, date of entry, date of leaving, part-time indicator, boarder indicator and actual national curriculum year group.
- Special Educational Needs: SEN provision.

- Home Information: Pupil/student's home address, unique property reference number (UPRN).
- Exclusion Information (01/01/2017 to 16/04/2017): category, reason, SEN provision, start date and actual number of sessions.
- Attendance Information (17/04/2017 to 31/07/2017): possible sessions, sessions missed due to authorised absence, sessions missed due to unauthorised absence, attendance codes and number of sessions missed.

For more information and instructions on all of the preparations that need to be carried out before the census return is produced, please refer to the appropriate *Preparing for the School Census Autumn 2017* guide.

03 Producing the School Census Autumn Return

| Creating a New School Census Return | 11 |
|---|----|
| Configuring the Census Folder | 12 |
| Specifying the Security Message for Reports | 13 |
| Editing Census Details | 14 |
| Editing School Information | 15 |
| Updating Early Years Data | 16 |
| Updating Pupil/Students with Top-Up Funding | 20 |
| Editing Pupil/Students Post Looked After Arrangements | 23 |
| Managing School Dinners Taken on Census Day | 26 |
| Entering Attendance Information | 30 |

Creating a New School Census Return

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

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

Data is collected for the following pupil/students:

- All pupil/students on-roll on 05/10/2017 (census day).
- Any additional pupil/students <u>not</u> on-roll on census day who:
 - were on-roll for at least one session during the collection period from 17/04/2017 and 31/07/2017.
 - had an exclusion that started between 01/01/2017 and 16/04/2017.
- 1. Select **Routines | Statutory Returns | School Census** to load the School Census validation and reporting files.

| Census Loading | |
|-------------------------------|--|
| Census files are being loaded | |
| Please wait | |
| | |

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

03| Producing the School Census Autumn Return

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

NOTE: The Fileset ID is displayed in the browser header (for information only).

| 🏇 Census Return for Autumn 2017 Term [F | ileset ID: 700 (SIMS.net)] | | | | | |
|---|----------------------------|-------------------|--------------|-----------|-----------------|----------------|
| 🖹 New 🏙 Search 🖾 Open 💥 Delete 🗔 E | Browse 🕂 Next 🏫 Previous 🧃 | Сору | | | | 😮 Help 💥 Close |
| Term Autumn 2017 👻 | Census Folder C:\St | atutoryReturns\Sc | hool Census | | | |
| Security message for Reports | | | | | | |
| This report contains sensitive information. | | | | | | |
| | | | | | Default Message | |
| Description | File Name | Census Date | Date Created | Validated | Authorised Date | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |

By default, the **Term** field displays the appropriate term for the selected return, in this instance **Autumn 2017**.

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

More Information:

Deleting an Unauthorised Return on page 52 Specifying the Security Message for Reports on page 13

Configuring the Census Folder

Before creating a return, the folder in which the return file will be saved must be specified.

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

You should be mindful of your school's responsibilities with respect to information security. Consider which users have access to the chosen folder, especially if the folder is shared on a server. Please refer to the DfE website <u>https://www.gov.uk/service-manual/technology/securing-your-information</u> for securing information guidance. If you are in any doubt, consult with your IT Security Officer before proceeding.

1. Specify the folder where the return files are to be stored by entering the folder location in the **Census Folder** field.

Alternatively, click the **Browse** button to display the **Browse For Folder** dialog.

| Browse For Folder | — X |
|--|------------|
| Desktop ▷ IN Computer ▷ IN Network ▷ IN Control Panel IN Recycle Bin | |
| Make New Folder | OK Cancel |

Browse button

Navigate to the location of the required folder and highlight it. If a suitable folder does not exist, click the **Make New Folder** button and enter a suitable name for the new folder.

2. Click the **OK** button to select or create the folder and return to the browser, where the new folder name is displayed.

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

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

Specifying the Security Message for Reports

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

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

Editing Census Details

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

- Census Date 05/10/2017.
- Attendance data collected from 17/04/2017 to 31/07/2017.
- Exclusions data collected from 01/01/2017 to 16/04/2017.
- FSM (Free School Meal) data collected from 19/05/2017 to 05/10/2017.

| <u>1</u> Census Details Census Date | 05/10/2017 | | Calculate All Details |
|--|------------------------------------|------------|-----------------------|
| Description | School Census Autumn 2017 | | |
| Attendance collected from | 17/04/2017 Attendance collected to | 31/07/2017 | |
| Exclusions collected from | 01/01/2017 Exclusions collected to | 16/04/2017 | |
| FSM collected from | 19/05/2017 FSM collected to | 05/10/2017 | |

The default **Description** (**School Census Autumn 2017**) can be edited, if required, e.g. to identify a dry run.

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

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

Calculating All Details

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

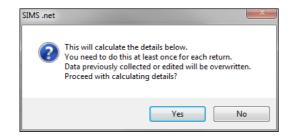
IMPORTANT NOTE: You must calculate all details at least once to populate the various panels for each return.

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

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

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

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



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

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

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

Editing School Information

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

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

| 2 School Information | | | | |
|-----------------------|-----------------------------|-----------------|---------------|--|
| School Name | Dean Special School | | | |
| LA | A Establishment Number 4676 | | | |
| Telephone | 01234 543211 | | | |
| School E-mail Address | school@we.com | | | |
| School Phase | School Phase SP Special | | | |
| School Type | Special School | | | |
| Governance | Community | Intake Type | Special | |
| Lowest NC Year | R | Highest NC Year | 14 | |
| | | | School Detail | |

1. If any details are missing or incorrect, click the **School Detail** button to display the **School Detail** dialog, where information applicable to your school is displayed.

| sims School Detail | | |
|-----------------------------------|---|--------|
| School Details - Dean Special Sch | ool | |
| 💾 Save 🍐 🔄 Undo | | 📀 Help |
| 1 Establishment 2 Address 3 Co | tact Details 4 Sites 5 Special School Information 6 Documents 6 Childcare | 魯 |
| <u>1</u> Establishment | | - |
| School Name | Dean Special School | |
| LA | 886 Kent | × |
| Establishment Number | 4676 | |
| Unique Reference Number | 012345 | |
| UK Provider Reference Number | | |
| School Phase | Special | |
| School Type | Special School 👻 | |
| School Governance | Community | |
| Intake Type | Special 👻 | |
| Previous School Name | Date Name Changed | |
| Previous Estab Number | Date Number Changed | |
| Previous URN Number | Date Number Changed | |
| Boarding Pupils | Nursery Class Special Class or Unit | |
| | | |
| Head Teacher | Mr Rylan Nelson Calvetti 🔍 💥 Main Contact R Amo | |
| Curriculum Years | R 14 | * |
| • | | 4 |
| | OK | Cancel |
| | | |

03| Producing the School Census Autumn Return

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

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

Ensure that the establishment's six digit **Unique Reference Number** (URN) is entered. The number is available via the EduBase website (<u>http://www.education.gov.uk/edubase/home.xhtml</u>).

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

Information for Academies

Academies should also 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 date is <u>not</u> collected.

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

Updating Early Years Data

Early Years data is collected from all schools that have early years pupils on-roll on census day.

Funded Hours and Hours at Setting

Funded hours are the total number of free child care hours that a child receives. All two, three and four year old pupils are eligible for 15 hours funded child care a week.

Hours at Setting include funded hours (as described previously) plus any additional hours funded by other means.

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

| Date of Birth Ranges | Phase and Year Group | Free Entitlement |
|---------------------------------------|---|------------------|
| 01/09/2013 to 31/08/2015 inclusive | All relevant schools and year groups | 15 hours |
| 01/09/2012 to 31/08/2013 inclusive | All schools (excluding Nursery schools) – National Curriculum Year groups E1, E2, N1 and N2 only. | |

Disability Access Fund

The Disability Access Fund is a payable as a lump sum once a year and awarded to three and four year old pupils who meet the following criteria:

- They are in receipt of child Disability Living Allowance (DLA) and
- They access their entitlement to free early learning and childcare, e.g. funded hours.

Disability Access Fund data is collected in this return for pupils who are in receipt of the fund on census day.

| Date of Birth Ranges | Phase and Year Group |
|---------------------------------------|--|
| 01/09/2013 to 31/08/2014 inclusive | All relevant schools and year groups |
| 01/09/2012 to 31/08/2013 inclusive | All schools (excluding Nursery schools) – National Curriculum Year groups E1, E2, N1 and N2 only. |

Extended Funded Hours and 30 Hour Code

Extended Funded Hours are the number of hours that are in addition to the initial 15 funded hours that a child receives and is applicable to three and four year old pupils only.

Extended Funded hours can double the original 15 hours of free child care to 30 hours a week, provided that the following criteria are met:

- Both parents must be working (or the sole parent is working in a lone parent family) and live in England.
- Each parent earns, on average, a weekly minimum equivalent to 16 hours at National Minimum Wage or National Living Wage.
- Each parent must have an annual income of less than the specified amount.

Parents who meet the extended funded hours criteria must obtain a code from the Tax Office (HM Revenue & Customs), then provide it to the school, together with other details, to confirm their eligibility for extended child care hours.

The 11 digit **30 Hour Code** and the number of extended funded hours are collected in this return for the week in which the census day falls.

| Date of Birth Ranges | Phase and Year Group | Free Entitlement |
|---------------------------------------|---|------------------|
| 01/09/2013 to 31/08/2014 inclusive | All relevant schools and year groups | 15 hours |
| 01/09/2012 to 31/08/2013 inclusive | All schools (excluding Nursery schools) – National Curriculum Year groups E1, E2, N1 and N2 only. | 15 hours |

Extended Funded Hours information provided by the DfE can be found on their website

https://www.gov.uk/government/publications/30-hours-free-childcare-la-an d-early-years-provider-guide.

Adding/Editing Early Years Data

The required data can be recorded:

- via the Edit button in the Early Years panel
- via Tools | Statutory Returns Tools | Update Early Years Update
 Early Years page. The data in the Early Years panel must be refreshed
 by clicking the Recalculate button.

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

| | (| 🧪 Edit | | | | | | | | | |
|-------------------|---------------|--------|-----|-----|----------------------|----------------------|---------------------|-----------------|------------------------------|-----------------|-----------------------------|
| Name | Date of Birth | AdNo. | YTI | Reg | Age at 31/08/2017 | Age at 31/12/2017 | Hours at Setting | Funded Hours | Disability Access Fund | 30 Hour Code | Extended Funded Hours |
| Abhra,Shaquib | 17/12/2013 | 001582 | | | 3 | 4 | | | | | |
| Delanve,Millicent | 10/02/2014 | 001583 | | | 3 | 3 | 30 | 15 | No | 5000000000 | 15 |
| Ellis,Paul | 08/02/2014 | 001584 | | | 3 | 3 | 30 | 10 | Yes | | |
| Kaur,Aafia | 04/04/2014 | 001585 | | | 3 | 3 | | | | | |
| Lin,Jian | 22/01/2014 | 001586 | | | 3 | 3 | | | | | |
| Martin,Araminta | 02/01/2014 | 001587 | | | 3 | 3 | | | | | |
| McCann,Austin | 18/02/2014 | 001588 | | | 3 | 3 | | | | | |

NOTE: Although SIMS allows schools to enter **Disability Access Fund**, **30 Hour Code** and **Extended Funded Hours** for pupils aged 2 at 31/08/2017, this information is not included in the return file because it is not required by the DfE. SIMS do not enforce such DfE rules in the user interface, as this is a relatively complex task and experience has shown that such rules can change at very short notice.

1. In the **Early Years** panel, click the **Edit** button to display the **Update Early Years** page. By default, the current term is displayed in the **Census** panel.

| Save 🏐 Undo | | | | | | | | | | | |
|--|--|--------------------------------------|---------|----------|-----------------------|----------------------|---------------------|------------------|----------------------------|-----------------|--------------------|
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| ensus | | Pupils V | | | | | | | | | |
| erm Autumn 2017 👻 | | Age at 31/08/20 | 17 | All | ▼ YTI | All 👻 | Reg | All | Status | All | - |
| | | 01100121 | | | | | | | | | |
| upils | | | | | | | | | | | |
| Disability Access Fund, | 30 Hour Code and Ext | ended Fur | nded Ho | ours are | NOT collected | in the census fo | or pupils aged | l 2 at 31/08/201 | 17 | | |
| | | | | _ | _ | - | | | | | |
| Name | Date of Birth | AdNo. | YTI | Reg | Age at 31/08/2017 | Age at 31/12/2017 | Hours at Setting | Funded Hours | Disability Access | 30 Hour Code | Extended Funded |
| | | | | | | | - | | Fund | Code | Hours |
| Abhra,Shaquib | 17/12/2013 | 001582 | | | 3 | 4 | | | Fund | Couc | Hours |
| | 17/12/2013 10/02/2014 | 001582 001583 | | | 3 3 | 4 3 | 30 | 15 | No | 5000000000 | |
| Delanve,Millicent | | | | | - | 4 3 3 | 30 30 | | | | |
| Abhra,Shaquib Delanve,Millicent Ellis,Paul Kaur,Aafia | 10/02/2014 | 001583 | | | 3 | - | | 15 | No | | |
| Delanve,Millicent Ellis,Paul | 10/02/2014 08/02/2014 | 001583 001584 | | | 3 | 3 | | 15 | No | | |
| Delanve,Millicent Ellis,Paul Kaur,Aafia | 10/02/2014 08/02/2014 04/04/2014 | 001583 001584 001585 | | | 3 3 3 | 3 | | 15 | No | | |
| Delanve,Millicent Ellis,Paul Kaur,Aafia Lin,Jian | 10/02/2014 08/02/2014 04/04/2014 22/01/2014 | 001583 001584 001585 001586 | | | 3 3 3 3 3 | 3 3 3 | | 15 | No | | |

2. To add or edit the number of **Hours at Setting**, **Funded Hours** and **Extended Funded Hours** (i.e. the number of hours in addition to the initial funded hours) for an individual pupil, select the required criteria in the **Pupils View** panel.

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

IMPORTANT NOTES: Values for **Funded Hours**, **Hours at Setting** and **Extended Funded Hours** should be entered using two decimal places. For example, 1 hour 15 minutes must be entered as 1.25. Zero (0) is an accepted value.

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

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

This number is then entered automatically for all the selected pupils.

- d. Click to the right of the grid to deselect all.
- e. Edit the entry for each pupil who is receiving a different number of hours. This is achieved by highlighting the required pupil, clicking the associated **Hours at Setting**, **Funded Hours** or **Extended Funded Hours** cell (as applicable) then entering the required number.
- 4. Indicate whether the pupils are in receipt of the **Disability Access Fund**. Click the applicable cell then select **Yes** or **No** from the drop-down list.
- 5. Enter the 11 digit **30 Hour Code**, e.g. 5000000000, in the applicable cell, if in receipt of extended funded hours.
- 6. Click the **Save** button.

If there are any pupils for whom zero hours have been recorded, a message is displayed. Click the **Yes** button to save the data or the **No** button to return to the **Update Hours** page, where the number of hours can be entered.

7. Click the **OK** button to return to the **Census Return Details** page, where the updated hours are displayed.

IMPORTANT NOTES:

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

- any information is update via Tools | Statutory Return Tools | Update Early Years
- a new pupil is added in SIMS
- a pupil's date of birth is amended.

Please note that when information is updated via the Edit button, the Early Years panel is refreshed automatically.



More Information:

Early Years Report on page 43

Identifying which Children have no Hours Recorded

- 1. On the **Census Return Details** page, click the **Edit** button (located in the **Early Years** panel) to display the **Update Early Years** page.
- In the Pupils View panel, ensure that the required Age at date, YTI and Reg group are selected and then select No Hours at Setting (or No Funded Hours) from the Status drop-down list.

Only pupils who do not have an entry for **Hours at Setting** (or **Funded Hours**) are displayed.

- 3. Enter the required values for these pupils as described previously.
- 4. Click the **Save** button.

Updating Pupil/Students with Top-Up Funding

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

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

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

| | / Edit | | | | | 🔄 Reca |
|---------|-------------------|----------|-----|-----|-----|---------|
| Surname | Preferred Surname | Forename | YTI | Reg | SEN | Ever in |
| Aaron | Aaron | Chris | 6 | 6KH | | No |
| Davies | Davies | Ben | 4 | 4ES | | No |
| Dexter | Dexter | Bethany | 3 | 3CB | | No |

The information displayed in the **Top-up Funding** panel is read-only. Updating top-up funding information, e.g. adding or removing a pupil/student, must be done via the **Edit** button. 1. Click the **Edit** button to display the **Update Pupil** (or **Student)s with Top-up Funding** dialog. The pupil/students currently recorded as having top-up funding are displayed in the **Top-up Funding** list (located in the bottom half of the page).

| Term Autumn 20 | 17 Students (| On-Roll on Census Day | | | | | |
|---------------------------|--|-----------------------|--------------------------------|-------------|-------|--------------|---|
| Surname | Forename | | ΥTI | All | ▼ Reg | All 👻 |] |
| Preferred Surname | SEN | <any> 💌</any> | Ever in care at this school | <any></any> | • | Q Search | |
| | | | | | | | |
| Top-up Funding | (The second seco | d J | Remove | | | | |
| Top-up Funding Surname | Ad Preferred Surname | d Sorename | Remove YTI | Reg | SEN | Ever in Care | |
| | Preferred Surname Aaron | Forename Chris | | 6KH | SEN | No | |
| | Preferred Surname | Forename | YTI | | SEN | | |

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

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

| ourname | white | | Forename | | | | YTI | All | • | Reg | All | • |
|----------|-------|--------|--------------|---|----------|---|------------------------|-------------|---|-----|--------------|---|
| referred | | | SEN | <ar< th=""><th>iy></th><th>•</th><th>Everin c at this sc</th><th><any></any></th><th>•</th><th></th><th>Q Search</th><th></th></ar<> | iy> | • | Everin c at this sc | <any></any> | • | | Q Search | |
| Surna | me | Prefer | rred Surname | | Forename | | YTI | Reg | S | EN | Ever in Care | |
| White | | White | | | Aurora | | 4 | 4SL | | | No | |
| White | | White | | | William | | R | ELM | | | No | |
| White | more | White | more | | Amie | | 2 | 2JB | | | No | |
| | | | | | | | | | | | | |

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

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

| referred urname Surna White | me P | SEN | <any> 👻</any> | | | | | |
|--------------------------------------|-------------------------|--|-------------------|--------------------------------|-------------------|-----|--------------------|--|
| | | | <any> 👻</any> | Ever in care at this school | <any></any> | • | Q Search | |
| White | 1 1 | referred Surname | Forename | YTI | Reg | SEN | Ever in Care | |
| | nead (V | hitehead | William | R | ELM | | No | |
| | | | | | | | | |
| op-up F | unding | Add | | Remove |] | | | |
| op-up F Surna | | eferred Surname | Forename | Remove |) Reg | SEN | Ever in Care | |
| | me P | | Forename Chris | | Reg 6KH | SEN | Ever in Care No | |
| Surna Aaron Davie | me P A s D | referred Surname aron avies | Chris Ben | YTI 6 4 | 6KH 4ES | SEN | No No | |
| Surna Aaron Davie Dexte | me P A s D r D | referred Surname aron avies exter | Chris | YTI 6 4 3 | 6KH 4ES 3CB | SEN | No No No | |
| Surna Aaron Davie | me P A s D r D | referred Surname aron avies | Chris Ben | YTI 6 4 | 6KH 4ES | SEN | No No | |

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



Additional Resources:

Preparing for the School Census Autumn 2017 Return handbook



Top-up Funding Report on page 43

Editing Pupil/Students Post Looked After Arrangements

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

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

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

| | 4 | nt Edit | | | | | Recalculate |
|----------|-------------------|----------|-----|-----|-----------|--|-------------|
| Surname | Preferred Surname | Forename | YTI | Reg | Ever in C | Post Looked After Arrangements | |
| De Souza | De Souza | Luciano | 12 | | Yes | Ceased to be looked after through Adoption | |
| Noble | Noble | Natasha | 12 | | No | Ceased to be looked after through a Special Guardianship Order (SGO) | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |

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

03| Producing the School Census Autumn Return

2. Click the **Edit** button to display the **Update Pupil** (or **Student**)**s Post Looked After Arrangements** page. Any pupil/students currently recorded as having PLAA are displayed in the **Post Looked After Arrangements** list (located in the bottom half of the page).

| erm | Autumn 2017 | ▼ Stude | ents Or | n-Roll o | on Census Day | y | | | | |
|---------------------|-------------------------------------|-------------|---------|----------|---------------------|--------------------------------|---------------|---------|-------------------------|-------------------|
| iurname | | Forena | me | | | YTI | All | • | | |
| referred Jurname | | Reg | | All | • | Ever in Care at this school | <any></any> | • | Q Search | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| lost Lool | ked After Arrangements | | Add | | | Remove | | | | |
| ost Lool Surna | | | | Reg | Ever in Care | Remove Post Looked After Arran | gements | | | Evidence Obtained |
| | me Preferred Surnan | | | _ | Ever in Care Yes | | | loption | | Evidence Obtained |
| Surna | me Preferred Surnar uza De Souza | ne Forename | YTI | | | Post Looked After Arran | er through Ad | | andianakia Ordea (2003) | |

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

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

| ferred | Forename | All | YTI Ever in Care at this school | 13 ▼ <any> ▼</any> | Q Search | |
|---------|-------------------|----------|---------------------------------------|-----------------------|--------------|--|
| Surname | Preferred Surname | Forename | YTI | Reg | Ever in Care | |
| Sampson | Sampson | Delilah | 13 | | No | |
| Smith | Smith | David | 13 | | No | |
| | | | | | | |

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

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

| | Surname | Preferred Surname | Forename | YTI | Reg | Ever in Care | Post Looked After Arrangements | Evidence Obtained |
|----|----------|-------------------|----------|-----|-----|--------------|---|-------------------|
| | De Souza | De Souza | Luciano | 12 | | Yes | Ceased to be looked after through Adoption | V |
| | Noble | Noble | Natasha | 12 | | No | Ceased to be looked after through a Special Guardianship Order (SGO) | |
| | Sampson | Sampson | Delilah | 13 | | No | Ceased to be looked after through a Special Guardianship Order (SGO) | V |
| Ø. | Smith | Smith | David | 13 | | No | | |
| | | | | | | | Ceased to be looked after through Adoption Ceased to be looked after through a Special Guardianship Order (SGO) Ceased to be looked after through a Residence Order (RO) Ceased to be looked after through a Child Arrangement Order (CAO) | |

- 5. For each pupil/student added to the **Post Looked After Arrangements** list, select the post looked after arrangement status by clicking in the applicable cell in the **Post Looked After Arrangements** column then selecting the required status from the drop-down list:
 - Ceased to be looked after through Adoption
 - Ceased to be looked after through a Special Guardianship Order (SGO)
 - Ceased to be looked after through a Residence Order (RO)
 - Ceased to be looked after through a Child Arrangement Order (CAO).

NOTE: **Ceased to be looked after through a Residence Order** (**RO**) *has been replaced by* **Ceased to be looked after through a Child Arrangement Order** (**CAO**).

You do not need to change any existing residence orders but new post looked after arrangements must be recorded as child arrangement orders.

6. Select the **Evidence Obtained** check box if documents have been obtained that provide evidence of the post looked after arrangements.

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

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

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

- 9. Click the **OK** button to continue.
- 10. Click the **OK** button (located at the bottom right-hand side of the screen) to return to the **Census Return Details** page, where the updated information is displayed in the **Post Looked After Arrangements** panel.



Additional Resources:

Preparing for the School Census Autumn 2017 Return handbook



More Information:

Post Looked After Arrangements Report on page 43

Managing School Dinners Taken on Census Day

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

NOTE for Special schools: The School Dinner Taken routine is applicable to Special schools that have on-roll pupils who have taken a school dinner on census day and who are in Year Taught In Reception, Year 1 or Year 2 and those in Year Taught In X aged four to six who were born between 01/09/2010 and 31/08/2013 inclusive.

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

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

NOTES: The **Reference Date** is provided so that your school can report school dinners taken on an alternative date to census day, if required.

The pupils listed in the **School Dinner Taken** panel are those who are on-roll on census day. Whereas the data calculated via the **Calculate From Attendance** and the **Calculate From Dinner Money** buttons is based on the reference date.

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

| 🖾 Group By 🝷 | | | | Calculate From Atte | endance Calculate From Dinne | er Money |
|--------------|----------|-----|-----------|---------------------|------------------------------|------------|
| Surname | Forename | YTI | Reg Group | Enrol Status | School Dinner Taken | ▲ Vick All |
| Abhra | Abjit | 2 | 2JB | Single Registration | | E 💥 Reset |
| Abhra | Alisha | 2 | 2JB | Single Registration | | Neset |
| Abhra | Neel | 2 | 2GH | Single Registration | | |
| Ackton | Stan | 2 | 2GH | Single Registration | | |
| Adams | Nancy | R | ELM | Single Registration | | |
| Akeman | Richard | 1 | ELM | Single Registration | | |
| Akeman | Steven | 1 | ELM | Single Registration | | |
| Alala | Candis | R | PINE | Single Registration | | |
| Alamilla | Sofia | 1 | PINE | Single Registration | | |
| Andrews | Josef | 2 | 2GH | Single Registration | | |
| Bailey | Eve | 2 | 2JB | Single Registration | | |
| Balik | Karolina | 1 | ASH | Single Registration | | |
| Balinski | Cyla | 2 | 2JB | Single Registration | | |
| Balinski | Fil | 2 | 2JB | Single Registration | | |

| 0 | By default, the Reference Date is set to 05/10/2017 (census day). If, due to exceptional circumstance, e.g. flooding, pupils were unable to take a school dinner on census day, the reference date can be changed to a date that reflects the normal situation. |
|---|--|
| 2 | Click the required column header to sort the data. |
| B | The Calculate From Attendance button is displayed only if SIMS Attendance is in use. |
| 4 | The Calculate from Dinner Money button is displayed only if SIMS Dinner Money is in use. |
| 6 | When the Reset button is clicked all existing ticks are removed from the School Dinner Taken column enabling you to start the process again. |
| 6 | The Total Taken and Total Not Taken provide an indication of whether the number of school dinners taken is correct or whether edits are required. |

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



More Information:

School Dinner Taken Report on page 42

Using Dinner Money to Calculate School Dinners Taken on Census Day

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

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

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

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

| Group By 🔹 | | | | Calculate From Atte | endance Calculate From Din | ner Money | |
|------------|----------|-----|-----------|---------------------|----------------------------|-----------|------------|
| irname | Forename | YTI | Reg Group | Enrol Status | School Dinner Taken | | 💞 Tick All |
| ohra | Abjit | 2 | 2JB | Single Registration | ✓ | E | 💥 Reset |
| ohra | Alisha | 2 | 2JB | Single Registration | ✓ | | A HOUL |
| ohra | Neel | 2 | 2GH | Single Registration | ✓ | | |
| :kton | Stan | 2 | 2GH | Single Registration | | | |
| lams | Nancy | R | ELM | Single Registration | | | |
| teman | Richard | 1 | ELM | Single Registration | ✓ | | |
| teman | Steven | 1 | ELM | Single Registration | ✓ | | |
| ala | Candis | R | PINE | Single Registration | | | |
| amilla | Sofia | 1 | PINE | Single Registration | | | |
| drews | Josef | 2 | 2GH | Single Registration | ✓ | | |
| iley | Eve | 2 | 2JB | Single Registration | | | |
| lik | Karolina | 1 | ASH | Single Registration | | | |
| linski | Cyla | 2 | 2JB | Single Registration | | | |
| linski | Fil | 2 | 2JB | Single Registration | ✓ | | |
| | 1 | | | | | | |

1. Click the Calculate From Dinner Money button.

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

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

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

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

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

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

Using Attendance to Calculate School Dinners Taken on Census Day

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

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

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

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

If missing marks exist, a message is displayed:

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

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

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

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

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

Using Manual Entry to Record School Dinners Taken on Census Day

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

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

| Group By 🔹 | | | | Calculate From Atte | Calculate From Dinne | er Money |
|------------|----------|-----|-----------|---------------------|----------------------|--------------|
| Surname | Forename | YTI | Reg Group | Enrol Status | School Dinner Taken | 🔺 🛷 Tick All |
| Abhra | Abjit | 2 | 2JB | Single Registration | ✓ | 🗐 💥 Reset |
| Abhra | Alisha | 2 | 2JB | Single Registration | ✓ | |
| Abhra | Neel | 2 | 2GH | Single Registration | ✓ | |
| Ackton | Stan | 2 | 2GH | Single Registration | | |
| Adams | Nancy | R | ELM | Single Registration | | |
| Akeman | Richard | 1 | ELM | Single Registration | ✓ | |
| Akeman | Steven | 1 | ELM | Single Registration | ✓ | |
| Alala | Candis | R | PINE | Single Registration | | |
| Alamilla | Sofia | 1 | PINE | Single Registration | | |
| Andrews | Josef | 2 | 2GH | Single Registration | ✓ | |
| Bailey | Eve | 2 | 2JB | Single Registration | | |
| Balik | Karolina | 1 | ASH | Single Registration | | |
| Balinski | Cyla | 2 | 2JB | Single Registration | | |
| Balinski | Fil | 2 | 2JB | Single Registration | ✓ | |
| | | | | | | |

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

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

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

Entering Attendance Information

Summer term attendance data (including attendance codes and the number of sessions missed) should be provided for non-boarder pupil/students aged four to 15 inclusive on 31/08/2016 who were on-roll for at least one session during each Summer half term, i.e. from 17/04/2017 to 28/05/2017 and 29/05/2017 to 31/07/2017.

IMPORTANT NOTE: Clicking the **Calculate All Details** button overwrites any edited data in every panel with the original data stored in SIMS. Do not use this button if you wish to keep any changes you have made.

After the **Calculate All Details** button is clicked, the information displayed in the **Attendance** panel is dependent on which of the following is applicable to your school:

- Attendance/Lesson Monitor is in use, the attendance codes being used are DfE compliant and there are either missing marks or no missing marks.
- Attendance/Lesson Monitor is in use and the attendance codes being used are DfE non-compliant.
- Attendance/Lesson Monitor is not in use.

SIMS Attendance/Lesson Monitor Users

If SIMS Attendance/Lesson Monitor is in use, ensure that all missing marks and unexplained absences for the previous term have been dealt with before commencing the return.

TIP: After the Create and Validate process is run, the Attendance detail report can be used to assist with the checking of attendance data. Select **Attendance Report** from the **Detail Report** drop-down list.

Are your Attendance Codes DfE Compliant?

If Attendance/Lesson Monitor is in use and your school is using DfE compliant attendance codes, attendance data is entered directly into the return, providing that there are <u>no</u> missing marks.

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

| 5 Attendance | | |
|--------------|---|--|
| | Your attendance codes are DfE compliant | |
| | This will be rechecked at the Create & Validate stage | |
| | | |

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

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

- 1. Use the Deal with Missing Marks routine (Focus | Attendance (or Lesson Monitor) | Deal with Missing Marks) to locate the missing marks and enter appropriate attendance codes.
- Return to the Census Return Details page and click the Check missing marks button in the Attendance panel to ensure that all missing marks have been dealt with.

NOTE: The Create and Validate process can still be run even if some attendance marks are missing. You will be asked if you wish to continue to create the return or cancel the Create and Validate process.



More Information:

Producing Detail Reports on page 40

Are your Attendance Codes DfE Non-Compliant?

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

| 5 Attendance | |
|--------------|--|
| | Your attendance codes are not DfE compliant |
| | Please deal with this lack of compliance and then press 'Check attendance codes' |
| | |
| | Check attendance codes |
| | |
| | |

- 1. Non-compliant codes must be dealt with. Please contact your Local Support Unit for assistance.
- 2. Click the **Check attendance codes** button to check that DfE attendance codes are now in use.

If the attendance codes are now DfE compliant, a message informs you that the codes will be rechecked at the **Create & Validate** stage.

3. Click the **OK** button to continue.

SIMS Attendance/Lesson Monitor Not in Use

If Attendance/Lesson Monitor is not in use, the following data must be entered manually for the two specified collection periods, i.e. from 17/04/2017 to 28/05/2017 and 29/05/2017 to 31/07/2017:

- Total Possible Sessions (**T Poss Sessions**)
- Total Sessions Missed due to Authorised Absence (**T Auth Absences**)
- Total Sessions Missed due to Unauthorised Absence (**T Unauth Absences**).

| Group By | - Atten | dance Collection | Period (17/04 | /2017-28/05/2 | 017) | | | | |
|---|--|------------------------------------|---------------|---|--|--|--|---|----------|
| | | | | | | 1 | 1 | | _ |
| Surname | Forename | Year Taught In | Reg Group | | A Poss Sessions | A Auth Absences | A Unauth Absences | | ^ |
| Alexanders | Bertina | | | On Roll | 0 | | | | |
| Babe | Bud | | | On Roll | 0 | 0 | 0 | | = |
| Bedeau | Sebastiana | | | On Roll | 0 | 0 | 0 | _ | |
| Benard | Junius | | | On Roll | 0 | 0 | 0 | _ | |
| Bourdage | June | | | On Roll | 0 | 0 | 0 | | |
| Calzone | Merlin | | | On Roll | 0 | 0 | 0 | | |
| Catapano | Charity | | | On Roll | 0 | 0 | 0 | | |
| Damrell | Glen | | | On Roll | 0 | 0 | 0 | | |
| Doberer | Hilbert | | | On Roll | 0 | 0 | 0 | | |
| Dusel | Ambrogio | | | On Roll | 0 | 0 | 0 | | |
| Frymark | Garnett | | | On Roll | 0 | 0 | 0 | | |
| Garcia | Sally | | | On Roll | 0 | 0 | 0 | | |
| Gaskey | Silvano | | | On Roll | 0 | 0 | 0 | | |
| | | | | | | | | | |
| Gaumont | Allegria | dance Collection | Period (29/05 | On Roll | 017) | 0 | 0 | | - |
| | • Atten | dance Collection | | /2017-31/07/2 | 017) | | | 4 | |
| Gaumont Group By Surname | Atten Forename | dance Collection Year Taught In | | /2017-31/07/2 Enrol Status | 017) A Poss Sessions | A Auth Absences | A Unauth Absences | | - |
| Gaumont Gaumont Group By Surname Alexanders | Atten Forename Bertina | | | /2017-31/07/2 Enrol Status On Roll | 017) A Poss Sessions 0 | A Auth Absences | A Unauth Absences | | - |
| Gaumont Group By Surname Alexanders Babe | Atten Forename Bertina Bud | | | /2017-31/07/2 Enrol Status On Roll On Roll | 017) A Poss Sessions 0 0 | A Auth Absences 0 0 | A Unauth Absences 0 0 | | • |
| Gaumont Group By Surname Alexanders Babe Bedeau | Atten Forename Bertina Bud Sebastiana | | | /2017-31/07/2 Enrol Status On Roll On Roll On Roll On Roll | 017) A Poss Sessions 0 0 0 0 | A Auth Absences 0 0 0 | A Unauth Absences 0 0 0 | | • |
| Gaumont Group By Surname Alexanders Babe Bedeau Benard | Atten Forename Bertina Bud Sebastiana Junius | | | /2017-31/07/2 Enrol Status On Roll On Roll On Roll On Roll On Roll | 017) A Poss Sessions 0 0 0 0 0 0 | A Auth Absences 0 0 0 0 0 | A Unauth Absences 0 0 0 0 0 | | • |
| Gaumont Gaumont Group By Surname Alexanders Babe Bedeau Benard Bourdage | Atten Forename Bertina Bud Sebastiana Junius June | | | /2017-31/07/2 Enrol Status On Roll On Roll On Roll On Roll On Roll On Roll | 017) A Poss Sessions 0 0 0 0 0 0 0 | A Auth Absences 0 0 0 0 0 0 | A Unauth Absences 0 0 0 0 0 0 0 | | • |
| Gaumont Group By Surname Alexanders Babe Bedeau Benard Bourdage Calzone | Atten Forename Bertina Bud Sebastiana Junius June Merlin | | | /2017-31/07/2 Enrol Status On Roll On Roll On Roll On Roll On Roll On Roll | 017) A Poss Sessions 0 0 0 0 0 0 0 0 0 | A Auth Absences 0 0 0 0 0 0 0 0 | A Unauth Absences 0 0 0 0 0 0 0 0 0 | | |
| Gaumont Group By Surname Alexanders Babe Bedeau Benard Benard Bourdage Calzone Catapano | Atten Forename Bertina Bud Sebastiana Junius June Merlin Charity | | | /2017-31/07/2 Enrol Status On Roll On Roll On Roll On Roll On Roll On Roll On Roll | 017) A Poss Sessions 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 | A Auth Absences 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 | A Unauth Absences 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 | | • |
| Gaumont Gaumont Group By Surname Alexanders Babe Bedeau Benard Bourdage Calzone Catapano Damrell | Atten Forename Bertina Bud Sebastiana Junius June Merlin Charity Glen | | | /2017-31/07/2 Enrol Status On Roll On Roll On Roll On Roll On Roll On Roll On Roll On Roll | 017) A Poss Sessions 0 0 0 0 0 0 0 0 0 0 0 0 0 0 | A Auth Absences 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 | A Unauth Absences 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 | | |
| Gaumont Group By Surname Alexanders Babe Bedeau Benard Bourdage Calzone Catapano Damrell Doberer | Atten Forename Bertina Bud Sebastiana Junius June Merlin Charity Glen Hilbert | | | /2017-31/07/2 Enrol Status On Roll On Roll On Roll On Roll On Roll On Roll On Roll On Roll On Roll | 017) A Poss Sessions 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 | A Auth Absences 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 | A Unauth Absences 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 | | |
| Gaumont Gaumont Group By Surname Alexanders Babe Bedeau Benard Bourdage Calzone Catapano Damrell | Atten Forename Bertina Bud Sebastiana Junius June Merlin Charity Glen Hilbert Ambrogio | | | /2017-31/07/2 Enrol Status On Roll On Roll On Roll On Roll On Roll On Roll On Roll On Roll On Roll | 017) A Poss Sessions 0 0 0 0 0 0 0 0 0 0 0 0 0 | A Auth Absences 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 | A Unauth Absences 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 | | |
| Gaumont Group By Surname Alexanders Babe Bedeau Benard Bourdage Calzone Catapano Damrell Doberer | Atten Forename Bertina Bud Sebastiana Junius June Merlin Charity Glen Hilbert | | | /2017-31/07/2 Enrol Status On Roll On Roll On Roll On Roll On Roll On Roll On Roll On Roll On Roll | 017) A Poss Sessions 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 | A Auth Absences 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 | A Unauth Absences 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 | | |
| Gaumont Gaumont Gaumont Gurname Alexanders Babe Bedeau Benard Bourdage Calzone Catapano Damrell Doberer Dusel | Atten Forename Bertina Bud Sebastiana Junius June Merlin Charity Glen Hilbert Ambrogio | | | /2017-31/07/2 Enrol Status On Roll On Roll On Roll On Roll On Roll On Roll On Roll On Roll On Roll | 017) A Poss Sessions 0 0 0 0 0 0 0 0 0 0 0 0 0 | A Auth Absences 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 | A Unauth Absences 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 | | |
| Gaumont Gaumont Group By Surname Alexanders Babe Bedeau Benard Bourdage Catapano Damrell Doberer Duseel Frymark | Atten Forename Bertina Bud Sebastiana Junius June Merlin Charity Glen Hilbert Ambrogio Garnett | | | /2017-31/07/2 Enrol Status On Roll On Roll On Roll On Roll On Roll On Roll On Roll On Roll On Roll On Roll | 017) A Poss Sessions 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 | A Auth Absences 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 | A Unauth Absences 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 | | T T |

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

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

2. To sort the displayed data by surname, forename, year group, registration group or enrolment status, click the appropriate column heading.

- For each pupil/student, enter the total number of possible sessions (T Poss Sessions), authorised absences (T Auth Absences) and unauthorised absences (T Unauth Absences) for each of the collection periods.
- 4. To clear the attendance information and check for additional pupil/students, click the **Check for additional students & zero totals** button.

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

04 Completing the School Census Autumn Return

| Creating and Validating a School Census Return | 35 |
|--|----|
| Producing Detail Reports | 40 |
| Printing a Report from your Web Browser | 45 |
| Transferring Report Data to a Spreadsheet | 45 |
| Deleting Temporary Web Browser Files | 45 |
| Producing the Summary Report | 46 |
| Editing an Unauthorised Return | 47 |
| Authorising the Return | 47 |
| Submitting the Return | 50 |
| Retrieving Authorised Census Return Files | 50 |
| Copying a Return | 52 |
| Deleting an Unauthorised Return | 52 |
| | |

Creating and Validating a School Census Return

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

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

An error is caused by either missing or inaccurate data, whilst a query highlights data which is unusual or not as expected, e.g. there are no pupil/students with special educational needs.

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

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

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

If there is an irregularity in the attendance marks, one of the following messages is displayed:

 If the attendance codes are not DfE compliant, the following message is displayed, informing you which code(s) must not be used.

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

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

 If no attendance marks are found and SIMS Attendance is in use, the following message is displayed informing you that the create and validate process cannot proceed.

| SIMS .net | | X |
|-----------|---|---|
| ? | There are no attendance marks. Please edit the attendance data. Create & Validate cannot proceed. | |
| | ОК | |

Click the ${\bf OK}$ button then edit the attendance data before attempting to create and validate the return again.

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

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

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

Alternatively, click the **No** button to cancel the process, then use the Deal with Missing Marks routine (**Focus | Attendance | Deal with Missing Marks**) to locate the missing marks and enter appropriate attendance codes. For more information, please refer to the *Managing Pupil/Student Attendance* handbook, as appropriate.

When the validation process is complete, the **Validation Errors Summary** panel is displayed at the bottom of the screen.

Resolving Validation Errors and Checking Queries

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

| ć | Report Close | | | | | | |
|----|--------------|-------------|---|---|--|--|--|
| Va | lidation | Errors Summ | ary Return Validated - 10 Validation rules failed (Errors - 4; Queries - 6) | | | | |
| S | itudent S | earch | A Find | Enter Student Name, DOB (YYYY-MM-DD) or UPN for student filter | | | |
| E | irror Sea | rch ALL | Total of displayed rows : 10 To resolve an error, click in row to navigate to the | e relevant screen | | | |
| | Туре | Sequence | Message | Location | Solution | | |
| ۲ | F | 1500 | UPN missing. | Name: Abraham, Janel Date of Birth: 2005-05-19, Female/UPN: | # Go to Focus Student Student Details and add or issue a UPN. | | |
| | F | 1500 | UPN missing. | Name: Reid, Rosie) Date of Birth: 2009-03-07, Female(UPN: | # Go to Focus Student Student Details and add or issue a UPN. | | |
| | F | 1840 | Pupils aged 5 and over Language missing or invalid. | Name: Henderson, Jack Date of Birth: 2010-05-07, Male UPN: K823299914029 | # Go to Focus Student Student Details Ethnic/cultural panel and enter First language. | | |
| | F | 2350 | Insufficient Address information provided. | Name: Bains, Kirk Date of Birth: 2005-01-18, Male UPN: H820200109012 | # Go to Focus Student Student Details Addresses and edit pupil's address | | |
| | Q | 1601Q | Please Check: Pupil's age is out of range for school type. | Name: Sungail, Skaistel Date of Birth: 2003-03-28, Female, Age: 12/UPN: B820200106088 | # Go to Focus Student Student Details and enter pupil's date of birth. | | |
| | Q | 1620Q | Please check: duplicate pupil records with the same Surname, Forename, Gender and Date of birth. | Name: Bennison, Hugol Date of Birth: 2010-02-03, Male/UPN: | # Go to Focus/Student/Student details and check for duplicate pupil record. | | |
| | Q | 1620Q | Please check: duplicate pupil records with the same Surname, Forename, Gender and Date of birth. | Name: Bennison, Hugol Date of Birth: 2010-02-03, Male/UPN: V823299914008 | # Go to Focus/Student/Student details and check for duplicate pupil record. | | |
| | Q | 2355Q | Please check: Pupil record with no address details. | Name: Balinski, Cylal Date of Birth: 2010-03-14, FemalelUPN: C823299914005 | # Go to Focus Student Student Details Addresses and edit pupil's address | | |
| | Q | 2520Q | Please check: sessions possible should not be greater than 150 | Name: Aaron, Liz Date of Birth: 2005-09-01, Female UPN: J820200109032 | # Go to Focus Attendance (Lesson Monitor) Display Marks and check the attendance marks | | |
| | Q | 2520Q | Please check: sessions possible should not be greater than 150 | Name: Aaron, Sophiel Date of Birth: 2005-09-01, Female(UPN: M820200109034 | # Go to Focus Attendance (Lesson Monitor) Display Marks and check the attendance marks | | |
| | | | | 1 | | | |

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

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

| Column | Description |
|----------|--|
| Туре | Displays the type of validation rule: Failure (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. |

04| Completing the School Census Autumn Return

| Column | Description |
|----------|---|
| 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.

| μ μ Line Line <thline< th=""> Line Line<</thline<> | 2 Close | | | | | | : | a Report | ć |
|--|---------|---|---|---|--|----------------|----------|----------|---|
| Entry Service ALL Total of displayed rooms 10 To reache an error, click in nov the neights to the velocat screen Solution Solution Solution Type Name Marce Architem. Lance Date if Brin. 2005;05:15. FemaleUPIN If Gross Froms 1 Solution | | | Enter Student Name DOB (VVVY-MM-DD) or LIPN for student filter | | Return Validated - 10 | mary | | | |
| p Pi 100 UPM manip. Name. Acutam and Due of Emix 2005-031.5 remail/UPK F So to Focus 100.4dert Data and add or uses u VH. p 150 UPM masing. Name. Real, Read Due of Emix 2005-037.5 remail/UPK F So to Focus 100.4dert Data and add or uses u VH. p 150 UPM masing. Name. Real, Read Due of Emix 2005-037.5 remail/UPK F So to Focus 100.4dert Data and add or uses u VH. p 150 Polia baged 5 and one Loggage massing or instell. Name. Real, Read Data & Emix 2005-037. Mail/UPK NR22229910297 F So to Focus 100.4dert Data and add or insex u VH. p 250 Install-ord Loggage massing or instell. Name. Second 5 Biol.2005-03.57. Mail/UPK NR22229910297 F So to Focus 100.4dert Data and end or VH. g 250 Install-ord Loggage massing or instell. Name. Surgal, Statust Data of Biol.2003-03.20.57. Mail/UPK NR22229910297 F So to Focus 10.4dert Data is benc/cutual and and end for F to tooggage g 1500 Pease Check. Repl's gais is at Charge to school type. Name. Surgal, Statust Data of Biol.2003-03.20.57. Enable, Age. 12UPK BED2000100088 F So to Focus 10.4dert Data and enter parts and et block. | | | | (a a conte | Total of displayed rows : 10 | • | | | |
| r | | Solution | Location S | | | Message | Sequence | Туре | |
| P F IMO Pipels spel 5 and over Langage missing or invalid. Here: Henderson, Jack Date d Brith. 2010;45:07, MaleUTPK 1K22229914229 # Go to Focul 5 Undert Datals Ethnic/cubural panel and enter for provide and enter provided. p ISS0 Invadicient Address information provided. Here: Sungal, Stackat Date d Brith. 2010;45:07, MaleUTPK 1K22229914229 # Go to Focul 5 Undert Datals Ethnic/cubural panel and enter for provide and enter provided. q ISS10 Pease Otack: Applis age is out range for school type Name: Sungal, Stackat Date d Brith. 2000;40:32, Female, Age 12UPR IE82020100088 # Go to Focul 5 Undert Datals Ethnic/cubural panel and enter provide date transformer for provide and the sungal. | | # Go to Focus Student Student Details and add or issue a UPN. | Name: Abraham, Janel Date of Birth: 2005-05-19, Female/UPN: 3 | | 9 | UPN missing | 1500 | F | • |
| p 2550 Insufficient Address information provided. Name Banes, field Date of Birth. 2005-01-10. MaleURIN M02000100012 (E.g. East Too concludent/planters/building). q 1501/q Pease Check: Papil's ages as of range for school type. Name Sungal, Statistic Date of Birth. 2005-02-32. Female. Age 12URIN B02000100568 If Girth Encountant and enter papil's date of birth. | | # Go to Focus Student Student Details and add or issue a UPN. | Name: Reid, Rosiel Date of Birth: 2009-03-07, Female/UPN: 3 | | 9 | UPN missing | 1500 | F | |
| 16102 Please Check: Pupil's age is out of range for school type. Name: Surgail: Skalatal Date of Brith: 2003-03-28, Female, Age 121/UPK: B820200106688 # Go to Focus I Student Chebalis and enter pupil's date of brith. | | # Go to Focus I Student I Student Details Ethnic/cultural panel and enter First | | r invalid. | 5 and over Language missing or i | Pupils aged | 1840 | F | |
| a | je. | itudent Student Details Ethnic/cultural panel and enter First language. | Name: Bains, Kirk Date of Birth: 2005-01-18, Male(UPN: H820200109012 // Go to Focus)St | | Address information provided. | Insufficient / | 2350 | F | |
| | | # Go to Focus Student Student Details and enter pupil's date of birth. | Name: Sungail, Skaistel Date of Birth: 2003-03-28, Female, Age: 12(UPN: B820200106088 # | r school type. | ok: Pupil's age is out of range for s | Please Chec | 1601Q | Q | |
| 15000 Disease sheak dualization unit cannot suit the same Supreme Suprem Supreme Supreme Supreme Supreme Supreme Supreme Supreme Supre | uud. | # Go to Econol/Student/Student details and shock for dualizate quait record | Name: Respires Hugel Date of Right 2010 02 02 Malal IRM: | the entries Company, Exceptions, Gender and Date of kirth | de al collecte e unit conserve units the | Plazas abas | 16200 | | |

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

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

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

| | 🖹 Report 😤 | | | | | | | | |
|---|--|--|---|------|---|---|--|--|--|
| v | alidation Errors Summary Return Validated - 10 Validation rules failed (Errors - 4; Queries - 5) | | | | | | | | |
| L | Student S | earch smit | h | Find | Enter Student Name, DDB (YYYY-MM-DD) or UPN for student filter | | | | |
| | Error Sea | | ch UPN: X823299913018. Name: Smith, Erin. Date of Birth: 2010-02-27. Female UPN: U820200107007. Name: Smith, Alex. Date of Birth: 2005-05-12. Male | | e relevant screen | | | | |
| | Туре | | JPN: B820200109006, Name: Smith, Amy, Date of Birth: 2005-03-02, Female | | Location | Solution | | | |
| ٠ | F | | JPN: R820892102373. Name: Smith, Laura. Date of Birth: 2005-02-19. Female JPN: M820200106087. Name: Smith, Jade. Date of Birth: 2004-03-02. Female | | Name: Abraham, Janel Date of Birth: 2005-05-19, Female(UPN: | # Go to Focus Student Student Details and add or issue a UPN. | | | |
| | F | | JPN: E820200107035. Name: Smith, Trinity. Date of Birth: 2003-12-11, Female JPN: Q820200107034. Name: Smith, Daniel. Date of Birth: 2004-02-07, Male | | Name: Reid, Rosiel Date of Birth: 2009-03-07, Female/UPN: | # Go to Focus I Student I Student Details and add or issue a UPN. | | | |
| | F | 1840 Pupils aged 5 and over Language missing or invalid. | | | Name: Henderson, Jacki Date of Birth: 2010-05-07, Male(UPN: K823299914029 | # Go to Focus Student Student Details Ethnic/cultural panel and enter First language. | | | |
| | F | 2350 | Insufficient Address information provided. | | Name: Bains, Kirkl Date of Birth: 2005-01-18, Male(UPN: H820200109012 | # Go to Focus(Student)Student Details Addresses and edit pupil's address | | | |
| Γ | Q | 1601Q | Please Check: Pupil's age is out of range for school type. | | Name: Sungail, Skaistel Date of Birth: 2003-03-28, Female, Age: 12(UPN: B820200106088 | # Go to Focus Student Student Details and enter pupil's date of birth. | | | |
| | | | | | | | | | |

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

| 6 | Report XCone | | | | | | |
|----|--------------|-------------|---|--|--|--|--|
| | | Errors Summ | | | | | |
| 5 | tudent Se | arch UPN: | | Enter Student Name, DOB (YYYY-MM-DD) or UPN for student filter | | | |
| E | rror Sear | ch ALL | Total of displayed rows : 2 To resolve an error, click in row to navigate to the | a relevant screen | | | |
| | | | | Location | Solution | | |
| ۲ | F | 1500 | UPN missing. | Name: Abraham, Janel Date of Birth: 2005-05-19, Female(UPN: | # Go to Focus Student Student Details and add or issue a UPN. | | |
| | Q | 2520Q | Please check: sessions possible should not be greater than 150 | Name: Abraham, Janel Date of Birth: 2005-05-19, Female(UPN: | # Go to Focus Attendance (Lesson Monitor) Display Marks and check the attendance marks | | |
| | | | | | · · · · · · · · · · · · · · · · · · · | | |
| | | | | | | | |
| | | | | | | | |
| Ĺ. | | | | | | | |
| L | | | | | | | |

 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.

| 📥 Repo | ort | | | | | Close |
|----------|---------------------|--------------|---|---|--|------------|
| | on Errors Summ | ary | Return Validated - 10 Validation rules failed (Errors - 4; Queries - 6) | | | |
| Student | Search | | Mi Find. | Enter Student Name, DOB (YYYY-MM-DD) or UPN for student filter | | |
| Error Se | arch QUEF | ries 🔽 | Total of displayed rows : 6 To resolve an error, click in row to navigate to the | e relevant screen | | |
| Type | Sequer ALL | | | Location | Solution | |
| Q | | RIES Med | k: Pupil's age is out of range for school type. | Name: Sungail, Skaistel Date of Birth: 2003-03-28, Female, Age: 12/UPN: B820200106088 | # Go to Focus Student Student Details and enter pupil's date of birth. | |
| Q | 1620Q 1500 1840 | | c duplicate pupil records with the same Sumame, Forename, Gender and Date of birth. | Name: Bennison, Hugo Date of Birth: 2010-02-03, Male(UPN: | # Go to Focus Student Student details and check for duplicate pupil record. | |
| Q | 1620Q 2350 16010 | 2 | c duplicate pupil records with the same Sumame, Forename, Gender and Date of birth. | Name: Bennison, Hugol Date of Birth: 2010-02-03, Male(UPN: V823299914008 | # Go to FocustStudentIStudent details and check for duplicate pupil record. | |
| Q | 2355Q 1620 23550 | | : Pupil record with no address details. | Name: Balinski, Cylal Date of Birth: 2010-03-14, Female/UPN: C823299914005 | # Go to Focus Student Student Details Addresses and edit pupil's address | |
| Q | 2520Q 25200 | ed | c sessions possible should not be greater than 150 | Name: Aaron, Liz Date of Birth: 2005-09-01, Female UPN: J820200109032 | # Go to Focus Attendance (Lesson Monitor) Display Marks and check the attended | ance mark: |
| Q | 2520Q | Please check | c sessions possible should not be greater than 150 | Name: Aaron, Sophiel Date of Birth: 2005-09-01, Female/UPN: M820200109034 | # Go to Focus Attendance (Lesson Monitor) Display Marks and check the attended | ance marks |

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

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

| e P | leport | | | | | X Close |
|------|---------|-------|----------------|---|---|---|
| | | | ummary | Return Validated - 10 Validation rules failed (Errors - 4: Queries - 6) | | |
| Stud | ent Sea | rch | | Find E | inter Student Name, DOB (YYYY-MM-DD) or UPN for student filter | |
| Erro | r Searc | 1 | ALL . | Total of displayed rows : 10 To resolve an error, click in row to navigate to the r | relevant screen | |
| Typ | | equer | VLL | | Location | Solution |
| • | F 1 | ~ (| RRORS | sing. | Name: Abraham, Janel Date of Birth: 2005-05-19, Female(UPN: | # Go to Focus Student Student Details and add or issue a UPN. |
| | F 1 | 500 | 1500 1840 | ling. | Name: Reid, Rosie) Date of Birth: 2009-03-07, Female(UPN: | # Go to Focus Student Student Details and add or issue a UPN. |
| | F 1 | ~~ | 2350 1601Q | ed 5 and over Language missing or invalid. | Name: Henderson, Jack Date of Birth: 2010-05-07, Male UPN: K823299914029 | # Go to Focus Student Student Details Ethnic/cultural panel and enter First language. |
| | | 300 | 1620Q 2355Q | nt Address information provided. | Name: Bains, Kirkl Date of Birth: 2005-01-18, Male/UPN: H820200109012 | # Go to FocusIStudentIStudent Details Addresses and edit pupil's address |
| | a 1 | 6010 | 1520Q | heck: Pupil's age is out of range for school type. | Name: Sungail, Skaistel Date of Birth: 2003-03-28, Female, Age: 12(UPN: B820200106088 | # Go to Focus Student Student Details and enter pupil's date of birth. |
| | Q 1 | 620Q | Pleas | check: duplicate pupil records with the same Sumame, Forename, Gender and Date of birth. | Name: Bennison, Hugol Date of Birth: 2010-02-03, Male(UPN: | # Go to Focus(Student)Student details and check for duplicate pupil record. |
| | | 6200 | Plane | scheck: duplicate pupil records with the same Surpame, Eccename, Gender and Date of hirth | Name: Remisson, Hunni Date of Rinth: 2010-02-03, Malel URM: V023200014008 | # Go to Ecourt/Student/Student details and check for duplicate pupil record |

The width of the columns can be changed by dragging the dividing line between the column headings until the required size is achieved.

View a summary of validation failures, which is particularly useful if there are a large number of errors/queries, by clicking the **Report** button (located at the left-hand side and directly above the **Validation Errors Summary** panel). The report is displayed in your web browser, e.g. Internet Explorer[®], where it can be printed or transferred to another application, if required (please see *Transferring Report Data to a Spreadsheet* on page 45).

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

ValidationErrorsSummary.HTML), is also stored in this folder.

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

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

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

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

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

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



More Information:

Transferring Report Data to a Spreadsheet on page 45

Producing Detail Reports

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

Each detail report header displays the **Security Message** that was defined in the **Census Return** browser, the **Report Criteria** and the **Total Pupil** (or **Student**)s who are listed in the report.

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

The following reports are currently available:

On Roll Basic Details Report

Report Criteria: Pupil/students on-roll on census day.

This report provides the following information about pupil/students who are on-roll on census day: UPN, ULN, legal surname, legal forename, preferred surname, former surname, date of birth, gender, year taught in (YTI), date of admission (DOA), enrolment status, language, nationality, country of birth, Youth Support Services Agreement (YSSA), part-time status and boarder status.

Leavers Basic Details Report

Report Criteria: Pupil/students not on-roll on census day:

- Leavers with attendance 1 term ago (17/04/2017 to 31/07/2017)
- Leavers with exclusions 2 terms ago (01/01/2017 to 16/04/2017).

This report provides the following information about pupil/students not on-roll on census day (Leavers): 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 status, attendance status, exclusion status.

Exclusions Report

Report Criteria: On-roll pupil/students and leavers with exclusions two terms ago (01/01/2017 to 16/04/2017). Not applicable to pupil/students who have exclusions with appeal result of **Reinstated** or **Not in the best interests of the child**.

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

Attendance First Half of Summer Term Report

Report Criteria: Pupil/students with attendance from 17/04/2017 to 28/05/2017. On-roll pupil/students and leavers (but <u>not</u> boarders) who were aged four to 15 at 31/08/2016.

This report displays the following information about pupil/students and their attendance during the first half of the Summer 2017 term: UPN, legal surname, legal forename, date-of-birth (DOB), gender, year taught in (YTI), number of termly sessions possible, number of termly absence sessions, on-roll status, termly attendance codes (authorised sessions and unauthorised sessions) and the number of sessions where attendance was not required.

Totals are displayed at the bottom of the applicable columns.

Code descriptions are displayed at the bottom of the report.

Attendance Second Half of Summer Term Report

Report Criteria: Pupil/students with attendance one term ago (29/05/2017 to 31/07/2017). On-roll and leavers (but <u>not</u> boarders) who were aged four to 15 at 31/08/2016.

This report displays the following information about pupil/students and their attendance during the second half of the Summer 2017 term: UPN, legal surname, legal forename, date-of-birth (DOB), gender, year taught in (YTI), number of termly sessions possible, number of termly absence sessions, on-roll status, termly attendance codes (authorised sessions and unauthorised sessions) and the number of sessions where attendance was not required.

Totals are displayed at the bottom of the applicable columns.

A list of codes and their descriptions are displayed at the bottom of the report.

Absentees Report

Report Criteria: Pupil/students who have missed 14 sessions and whose absence might need to be tracked. On-roll pupil/students and leavers (not boarders) with attendance one term ago (17/04/2017 to 28/05/2017) 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 pupil/students are shown on this report.

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

SEN Report

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

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

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

Address Details Report

Report Criteria: Pupil/students on-roll on census day.

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

Definition:

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

School Dinner Taken Report

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

- Pupil/students in Year Taught In R, 1 and 2.
- Pupil/students in year Taught In X who are aged four to six and who were born between 01/09/2010 and 31/08/2013 inclusive (Special schools only).

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

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

Free School Meal Eligibility Report

Report Criteria: On-roll pupil/students on census day who were eligible for free school meals on or after 19/05/2017 and up to and including census day.

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

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

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

Top-up Funding Report

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

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

Early Years Report

Report Criteria: Pupils on-roll on census day who have early years data.

- All 2 year olds born between 01/09/2014 and 31/08/2015 (Hours at setting and Funded Hours only)
- All 3 year olds born between 01/09/2013 and 31/08/2014
- All 4 year olds born between 01/09/2012 and 31/08/2013 with Year Taught In E1, E2, N1 or N2.

The report provides the following information for each early years pupil: UPN, legal name, legal forename, date of birth (DOB), gender, year taught in (YTI), hours at setting, funded hours, 30 hour code, extended funded hours and disability access fund.

Post Looked After Arrangements Report

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

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

Generating Detail Reports

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

| Census Return Details - Autumn 2017 Term : School Census Autumn 2 | 2017 | |
|---|---|-----------------------|
| 🔛 Save 🍵 Undo 🖌 🖉 Create & Validate 🔟 Summary 🔌 Authorise | 🔚 DetailReport 👻 | |
| 1 Census Details 2 School Information 3 Early Years 4 Class Type 5 1 | On Roll Basic Details Report | Attendance |
| 1 Census Details Census Date 05/10/2017 | Leavers Basic Details Report Exclusions Report | Calculate All Details |
| Description School Census Autumn 2017 Attendance collected from 17/04/2017 | Attendance Report(1st half term) Attendance Report(2nd half term) Absentees Report | |
| Exclusions collected from 01/01/2017 S Exclusions collected from 19/05/2017 S FSM collected to | SEN Report | |
| 2. School Information School Name Dean Special School LA B23 Establishment N Telephone B52015 | School Dinner Taken Report Free School Meal Eligibility Report Top-up Funding Report Early Years Report Post Looked After Arrangements Report | |
| School F-mail Address Indeal/Aur com | Multiple Reports | |

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

| S Detail Reports | |
|---------------------------------------|-----------|
| On Roll Basic Details Report | |
| Leavers Basic Details Report | |
| Exclusions Report | |
| Attendance Report(1st half term) | |
| Attendance Report(2nd half term) | |
| Absentees Report | |
| SEN Report | |
| Address Details Report | |
| School Dinner Taken Report | |
| Free School Meal Eligibility Report | |
| ☑ Top-up Funding Report | |
| Early Years Report | |
| Post Looked After Arrangements Report | |
| Repo | rt Cancel |

By default, all detail reports are selected. If any reports are not required, deselect the associated check box. Click the **Report** button to generate the selected reports, which are displayed in your web browser from where the data can be transferred to a spreadsheet such as Microsoft[®] Excel if required.

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

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

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

For example:

```
8864676_SC3_886LL17_001_onroll_pupil_basic_details_report.
html.
```

More Information:

Specifying the Security Message for Reports on page 13 Transferring Report Data to a Spreadsheet on page 45

Printing a Report from your Web Browser

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

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

Transferring Report Data to a Spreadsheet

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

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

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

Deleting Temporary Web Browser Files

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

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

Deleting the cache in Internet Explorer 10

- 1. Select **Tools | Internet options** to display the **Internet Options** dialog.
- 2. Select the **General** tab.
- 3. In the **Browsing history** section, click the **Delete** button to display the **Delete Browsing History** dialog.
- 4. Ensure that the **Temporary Internet Files and website files** check box is selected then click the **Delete** button.

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

5. Click the **OK** button.

04| Completing the School Census Autumn Return

Deleting the cache in Internet Explorer 8 and 9

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

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

6. Click the **OK** button.

Producing the Summary Report

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

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

Generating the Summary Report

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

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

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

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

For example: 8864676 SC3 886LL17 001 Summary Report.html.

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



More Information:

Specifying the Security Message for Reports on page 13 Generating Detail Reports on page 43 Authorising the Return on page 47 Deleting an Unauthorised Return on page 52

Editing an Unauthorised Return

The return details, e.g. **Description**, **School Information**, etc. can be edited via the **Census Return Details** page at any time prior to authorisation.

IMPORTANT NOTE: An authorised return cannot be edited. If changes are required to an authorised return, use the **Copy** facility to produce a duplicate return (with a unique description) in which the changes can be made.

- 1. Select **Routines | Statutory Returns | <census name>** to display the browser.
- Ensure that the Census Folder and the Security message for Reports are correct then click the Search button to display any previously created returns. Unauthorised returns can be recognised by their .UNA suffix.
- 3. Double-click the required return. Alternatively, highlight the required return then click the **Open** button to display the **Census Return Details** page.
- 4. Edit the return details as required.
- 5. Ensure that the correct value for historical spot allowances has not been specified via **Tools | Setups | Employment Parameters**.
- 6. Click the **Create & Validate** button to display the **Validation Errors Summary** panel.
- 7. Resolve any errors and check any queries before running the Summary report and detail reports to ensure that the information is correct.
- 8. Repeat the editing process again, if necessary.
- 9. Click the **Save** button.

More Information:

Configuring the Census Folder on page 12 Specifying the Security Message for Reports on page 13 Resolving Validation Errors and Checking Queries on page 37 Producing Detail Reports on page 40 Producing the Summary Report on page 46

Authorising the Return

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

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

1. Click the **Authorise** button.

If missing marks exist, the following message is displayed.

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

2. Click the **Yes** button to continue with the authorisation process or the **No** button if you want to return to SIMS where the missing marks can be entered.

If you choose to continue, a message reminds you that the return cannot be edited once it is authorised.

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

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

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

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

- 4. Enter any additional text to be displayed on the authorisation report, if required. This may be requested by your LA, e.g. to explain the reason for any validation failures.
- 5. Select the confirmation check box to confirm that the Head Teacher is satisfied that the Summary and/or detail reports have been checked and that the return file is ready for upload to your LA/DfE.

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

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

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

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

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

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

After the return is authorised, reports based on cohorts can be created (via **Reports | Design Reports**), so that items collected in the return can be tracked. Provided that **Student** has been selected as the data area, the Statutory Returns sub-report is available for selection when specifying the fields to be included in the report (the last node).



Additional Resources:

Designing and Running Reports handbook

More Information:

Producing the Summary Report on page 46 Retrieving Authorised Census Return Files on page 50 Copying a Return on page 52

Submitting the Return

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

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

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



More Information:

Configuring the Census Folder on page 12 *Copying a Return* on page 52

Retrieving Authorised Census Return Files

Authorised returns are stored in your Document Management Server (DMS). The Returns Manager can download and run the reports associated with previous authorised returns enabling the data for the current return to be compared with that submitted previously.

- 1. Select Tools | Statutory Returns Tools | Retrieve Authorised Census Return Files to display the Retrieve Authorised Census Return Files for <census name> page.
- 2. Select the type of census required from the **Return Type** drop-down list to display a list of previous returns that match the selected criteria.
- 3. By default, the files **Download to** the folder specified in the census browser. To specify a different folder:
 - a. Click the **Select a Folder** button (...) to display the **Browse For Folder** dialog. Navigate to the location of the required folder then highlight it. If a suitable folder does not exist, click the **Make New Folder** button then enter a suitable folder name.

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

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

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

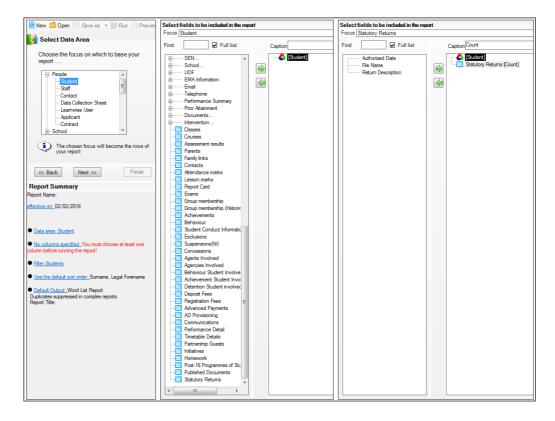
The authorised return file (i.e. the XML file) and all reports associated with the selected return are downloaded from your DMS to the specified folder. The folder and its contents are then displayed automatically, enabling you to open the required files in your web browser.

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

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

The **Statutory Returns** sub-report is available for selection only if **Student** has been selected as the Data Area.

When you **Select fields to be included in the report**, the **Statutory Returns** sub-report is located at the bottom of the list (the last node). Three options are available for selection under this sub-report: **Authorised Date, File Name** and **Return Description**.





Additional Resources:

Designing and Running Reports handbook

Copying a Return

An unauthorised return can be copied and saved as a new return. This enables a 'snapshot' of a return to be taken at any time providing a backup of any manual changes that have been made to the return, for example before recalculating details.

This functionality can also be used to make a copy of an authorised return if the LA or DfE requires it to be resubmitted. The necessary corrections can then be made to the data. The copied return must be saved, created, validated and authorised before resubmitting.

NOTE: Ensure that the return you wish to replicate is not open at the time of copying.

- 1. Select **Routines | Statutory Returns | <name of census>** to display the census browser.
- 2. Click the **Search** button to ensure that the list of returns is displayed.
- 3. Highlight the file you wish to copy then click the **Copy** button.

A message requests confirmation that you wish to make a copy of the selected return.

IMPORTANT NOTE: Any values for attendance (where applicable), Early Years, Post Looked After Arrangements and Top-up Funding will <u>not</u> be copied but will be populated from the current values held in the database.

The Create & Validate routine must be run to generate a new census file.

 Click the Yes button to make the copy, which is then displayed in the browser as:

Copy of <description of selected file>.

- 5. To rename the copied return, highlight it then click the **Open** button to display the **Return Details** page.
- 6. In the **Census Details** panel, edit the **Description** then click the **Save** button.

IMPORTANT NOTE: The new **Description** must be unique for this return. SIMS will not save the data if a duplicate return description is found.

Deleting an Unauthorised Return

During the return process, a number of copies of the return may be created, e.g. to track progress. When the return has been authorised successfully, it is advisable to delete any versions of the return that are no longer required. This keeps the number of files in the storage folder and listed in the browser to a minimum, therefore removing confusion and lessening the risk of selecting the wrong return.

The delete routine can be used to remove unwanted returns at any time prior to the relevant return being authorised.

IMPORTANT NOTES: When a return file is deleted, any associated files, e.g. Validation Errors Summary, detail reports, etc. that have been produced are also deleted.

Any return files that have already been authorised cannot be deleted.

- 1. Select **Routines | Statutory Returns | <Return name>** to display the browser.
- 2. Click the **Search** button to ensure that the list of return files is displayed.
- 3. Highlight the return file to be deleted then click the **Delete** button. A message prompts for confirmation that the selected return should be deleted.
- 4. Click the **Yes** button to permanently delete the selected return file and all associated report files.

The deleted return file is removed from the browser and the storage folder, along with any associated reports.

I| Index

Index

3

| 30 hour | code . | | 16, | 43 |
|----------|--------|------|---------|----|
| 50 11001 | couc. | | | 15 |

Α

| access rights7 |
|--|
| address details report 42 |
| attendance information |
| compliant codes31 |
| non-compliant codes 31 |
| school dinner taken on census day . 26, 29 |
| SIMS Attendance not in use29, 32 |
| authorising 47 |
| retrieving previous authorised census |
| returns 50 |
| school census47 |

С

D

| data collected |
|-----------------------------|
| school level8 |
| pupil/student level8 |
| default folder |
| defining13 |
| deleting |
| school census return52 |
| temporary web browser files |

| description |
|---|
| editing14 |
| detail reports |
| generating 43 |
| producing 40 |
| transferring to a spreadsheet |
| DfE compliant codes 31 |
| DfE non-compliant codes 31 |
| dinner money |
| school dinner taken on census day .26, 28 |
| disability access fund16, 43 |
| |

Ε

| early years data |
|---------------------------------|
| 30 hour code16 |
| disability access fund16 |
| extended funded hours16 |
| funded hours16 |
| hours at setting16 |
| report 43 |
| updating16 |
| editing |
| an unauthorised return 47 |
| census description14 |
| school details15 |
| entering |
| attendance information |
| errors and queries (validation) |
| resolving |
| extended funded hours16, 43 |

F

| free school meals | |
|--------------------|----|
| eligibility report | 42 |
| funded hours | |
| no hours recorded | 20 |
| updating | 16 |
| | |

Н

| hours at setting | |
|-------------------|------|
| no hours recorded | . 20 |

I| Index

| updating | 16 |
|------------------------------|----|
| L | |
| leavers basic details report | 40 |
| loading | |
| school census files | 35 |

Ν

| new return | |
|------------|----|
| starting | 11 |

0

| on-roll basic details report | 40 |
|------------------------------|----|
|------------------------------|----|

Ρ

| permissions7 |
|---------------------------------------|
| post looked after arrangements23, 43 |
| preparation |
| checking data8 |
| minimum version of SIMS8 |
| permissions7 |
| previous authorised census returns 50 |
| printing |
| reports45, 50 |
| validation errors summary |
| producing |
| the return 11 |
| pupil/student reconciliation |
| universal infant school meal |

Q

| queries and errors (validation) | |
|---------------------------------|--|
| resolving | |

R

| deleting temporary web browser files 4 | 15 |
|--|----|
| designing reports5 | 50 |
| producing detail reports 4 | 10 |
| absentees report 4 | 1 |
| address details report 4 | 12 |
| attendance report 4 | 1 |
| | |

| exclusions report41 |
|--|
| free school meal eligibility report 42 |
| generating detail reports |
| leavers basic details report |
| on-roll basic details report |
| post looked after arrangements report43 |
| |
| school dinner taken report |
| SEN report 42 |
| top-up funding report |
| specifying security message |
| resolving |
| errors and queries37 |
| retrieving |
| authorised census return files 50 |
| return |
| creating11 |
| |

S

| school census return |
|---|
| authorising47 |
| configuring the storage folder12 |
| copying 52 |
| create & validate 35 |
| creating a new return 11 |
| deleting 52 |
| new 11 |
| submitting 50 |
| school dinner taken on census day 26 |
| school information |
| checking |
| Checking |
| security |
| - |
| security |
| security deleting temporary files 45 |
| security deleting temporary files |

| printing 4 | 5 |
|-------------|---|
| producing 4 | 6 |

Т

| temporary web browser files |
|------------------------------|
| deleting 45 |
| top up funding |
| updating20, 43 |
| transferring |
| report data to a spreadsheet |
| submitting the return |

U

| U | |
|--------------------------------|----|
| unauthorised return | |
| copying | 52 |
| deleting | 52 |
| editing | 47 |
| updating | |
| early years data | 16 |
| post looked after arrangements | 23 |
| top-up funding | 20 |
| uploading the return | 50 |

V

| validating school census | 35 |
|--------------------------|----|
| validation failures | |
| resolving | 37 |



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

or email us on misservicedesk@ schoolbusinessservices.co.uk