

Preparation guide

Applicable to 7.178 onwards

Preparing for the School Census Spring 2018 Return

English Primary, Nursery
& Special school phase



School Census Spring 2018 Preparation Check List

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

Complete	Task Description
<input type="checkbox"/>	Check with your System Administrator/Manager that you have the appropriate permissions to run the School Census and to record associated data (please see <i>Setting Permissions</i> on page 3).
<input type="checkbox"/>	Upgrade to the SIMS 2017 Autumn Release (SIMS 7.178) or later as soon as possible to enable dry runs to be carried out.
<input type="checkbox"/>	Check with your System Administrator/Manager that the latest fileset version has been imported (please see <i>Importing Revised Filesets for Validation and Reports</i> on page 4).
<input type="checkbox"/>	Carry out a dry run to determine what information needs to be updated (please see <i>Why Carry out a Dry Run?</i> on page 9).
<input type="checkbox"/>	Check School Level information, e.g. establishment details, school email, etc. (please see <i>Checking Establishment Details</i> on page 17).
<input type="checkbox"/>	Check school childcare information (please see <i>Checking School Childcare Details</i> on page 19).
<input type="checkbox"/>	Ensure that leavers and re-admissions have been recorded (please see <i>Recording Leavers and Re-Admissions</i> on page 30), and that any pupil records created in error have been deleted (please see <i>Deleting Unwanted Pupil Records</i> on page 33).
<input type="checkbox"/>	Check the pupils' basic details, e.g. name, date of birth, gender, etc. (please see <i>Checking a Pupil's Basic Details</i> on page 33).
<input type="checkbox"/>	Check the pupils' various registration details, e.g. enrolment status, admission date year taught in, UPN, part-time information, etc. (please see <i>Checking Registration Details</i> on page 35).
<input type="checkbox"/>	Check the pupils' home address information (please see <i>Checking Home Address Information</i> on page 47).
<input type="checkbox"/>	Check the pupils' eligibility for free school meals (please see <i>Checking Free School Meals Eligibility</i> on page 48).
<input type="checkbox"/>	Check the pupils' ethnic and cultural information (please see <i>Checking Ethnic and Cultural Information</i> on page 50).
<input type="checkbox"/>	Check the applicable information recorded in the Additional Information panel (please see <i>Checking Additional Information</i> on page 52).
<input type="checkbox"/>	Check Special Educational Needs information (please see <i>Checking Special Educational Needs Information</i> on page 54).
<input type="checkbox"/>	Check exclusions information (please see <i>Preparing Exclusions Information</i> on page 58) (not applicable to Nursery schools).

Complete	Task Description
<input type="checkbox"/>	Check attendance data (please see <i>Preparing Termly Attendance Information</i> on page 60) (not applicable to Nursery or Special schools).
<input type="checkbox"/>	Check Early Years information (please see <i>Updating Early Years Information</i> on page 64) (applicable to schools that have 2, 3 or 4 year olds pupils only).
<input type="checkbox"/>	Check class type information (please see <i>Updating Class Types</i> on page 62).
<input type="checkbox"/>	Check top-up funding information (please see <i>Updating Pupils with Top-Up Funding</i> on page 67).
<input type="checkbox"/>	Check adopted from care information (please see <i>Updating Pupils Post Looked After Arrangements</i> on page 69).

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Introduction

This preparation guide has been produced to help to identify the most common tasks that need to be carried out before running the School Census Spring 2018 Return.

The information in this guide applies to all English LA maintained Nursery, Primary, Middle deemed Primary and Special school phases. It also applies to Academies and Pupil Referral Units that cover any of these school phases.

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

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

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

Changes to the return include the following:

- Census date 18/01/2018
- Attendance collected from the start of the 2017 Autumn term to 31/12/2017 (**not applicable to Nursery schools**)
- Exclusions collected from 17/04/2017 (Easter Monday) to 31/08/2017 (**not applicable to Nursery schools**)
- Free School Meal Eligibility collected from 06/10/2017 to 18/01/2018
- Learner Support collected from 01/08/2017 to 18/01/2018 (**applicable to Special schools and Pupil Referral Units only**).

Two Year Old Basis for Funding

Applicable to schools with Early Years children only

Routines | Statutory Return | School Census

The following changes have been made to enable schools to record the basis for funding for two year old pupils:

- 2 Year Old Basis for Funding grid
A new grid (entitled **2 Year Old Basis for Funding**) is available in the **Early Years** panel to enable schools to enter the basis for funding for each pupil with a date of birth from 01/01/2015 to 31/12/2015.
- 2 Year Old Basis for Funding report
This new report enables schools to check the two year old basis for funding information being collected in the return. The report is available from the **Detail Report** drop-down list.

Early Years Pupil Premium Eligibility Report

Applicable to schools with Early Years children only

Routines | Statutory Return | School Census

The new EYPPE detail report enables schools to check the early years pupil premium eligibility information being collected in the return. The report is available from the **Detail Report** drop-down list.

Earliest Date of Admission

Routines | Statutory Return | School Census Focus | School | School Details

The **Date Number Changed** screen label (associated with the previous establishment number) has been changed to **Earliest DOA** (date of admission) in the following panels:

- **School Information** panel (School Census)
- **Establishment** panel (School Details).

This date represents the date of admission of pupils into a sponsor-led Academy that has a new DfE Establishment Number.



Additional Resources:

Setting Up and Administering SIMS handbook



More Information:

Information for Academies on page 18

Setting Permissions

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

Producing the Return

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

Editing and Preparing Data

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

- Administration Assistant
- Admissions Officer
- School Administrator.

Importing Revised Files

The Import Fileset functionality enables updates to the Validation Errors Summary and the Summary report (derived from files supplied by the Statutory Body), and detail reports (provided by SIMS), to be imported into SIMS between SIMS releases.

To use the Import Fileset functionality (via **Tools | Setups | Import Fileset**), you must be a member of any of the following user groups in System Manager:

- Returns Manager
- System Manager.

For more information about the Import Fileset functionality, please refer to the applicable preparation guide, available via the **School Business Services Blog**

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 Autumn Release (7.178) 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 7.178 or later.



Importing Revised Filesets for Validation and Reports

Applicable to the Personnel Officer, Returns Manager and System Manager

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

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

NOTE: Use of the Import Fileset routine between releases is not always required. If updated files are available for import, a notification is displayed on the School Business Services Blog (<https://www.schoolbusinessservices.co.uk/blog/>)

Revised files can be:

- downloaded from the School Business Services Blog (<https://www.schoolbusinessservices.co.uk/blog/>) to a folder of your choice.
- The files available for download from the blog are zipped. Once the ZIP file is downloaded it should be unzipped to a folder of your choice. The Import Fileset routine can then be run by a user at the school who has the appropriate permissions.

IMPORTANT NOTE: Ensure that the Document Management Server (DMS) is configured correctly before attempting to import the files.

- authorised and deployed to schools via SOLUS3. The Import Fileset routine can then be run by a user at the school who has the appropriate permissions.

IMPORTANT NOTE: In SOLUS3, administrators must ensure that the SIMS user details (SIMS username and password) and SIMS database are set up in **Targets**.

For more information, please refer to the *SOLUS3 for Local Authorities* handbook.

TIP: To check which version of the fileset is currently in use, select **Routines | Statutory Returns | <census name>** to display the **Census Return** browser. The **Validation Fileset ID** is displayed in the browser header.

Before Importing the Revised Files

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

If the connection is unsuccessful, check the following details:

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

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

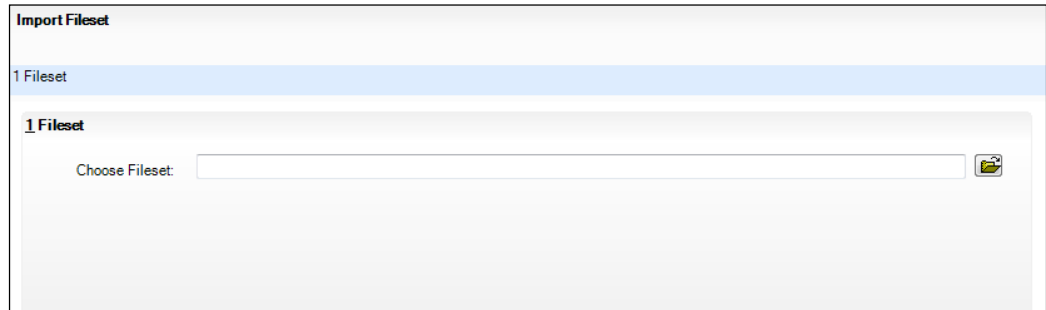


Additional Resources:

Setting up and Administering SIMS handbook

Importing the Revised Files

1. In SIMS, select **Tools | Setups | Import Fileset** to display the **Import Fileset** page.

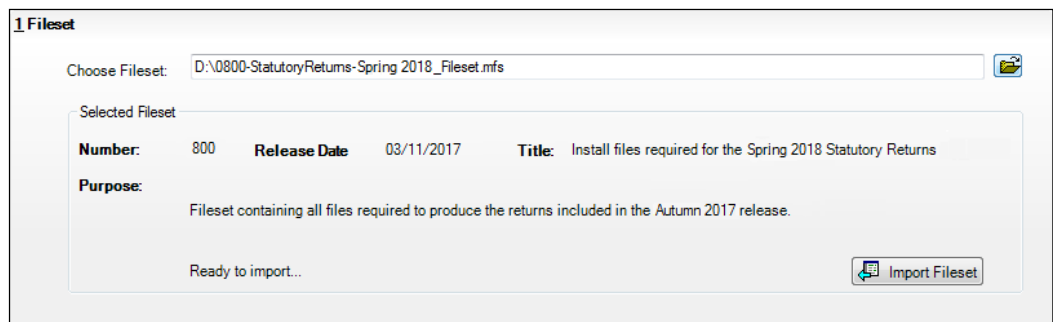


2. Click the **Browse** button to display the **Open** dialog.
3. Navigate to the location of the downloaded fileset. The file name is made up of the following data fields: <Fileset Number>-StatutoryReturns-<Term and Year>_Fileset.mfs.

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

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

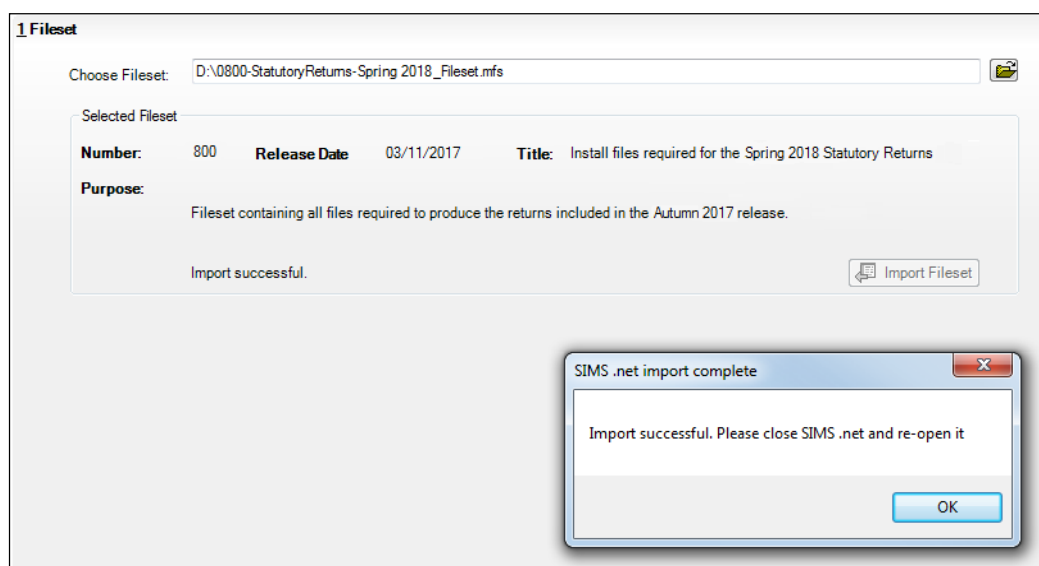
NOTE: The following graphics show example data only.



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

5. Click the **Import Fileset** button to import the fileset into the DMS.

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



6. Click the **OK** button then restart SIMS.
7. Run the return in the usual way.



School Census Return Process Flow

The following provides a brief outline of the steps involved in producing the School Census Spring 2018 Return. If data has been regularly and accurately maintained, many of the activities in this document are unnecessary. However, it is advisable to check to ensure that the information is up-to-date.

1. Upgrade to the SIMS 2017 Autumn Release (7.178) or later.
2. Carry out one or more dry runs to identify any errors that may exist in your data.
3. Ensure that the relevant pupil and school data exists in SIMS and that it is complete and correct. Use the Bulk Update routine (**Routines | Pupil | Bulk Update**) to add missing or correct invalid data, if required.
4. Complete the information on the **Census Return Details** page.
5. Create and validate the return.
6. Resolve any validation errors/queries and then create and validate the return again.

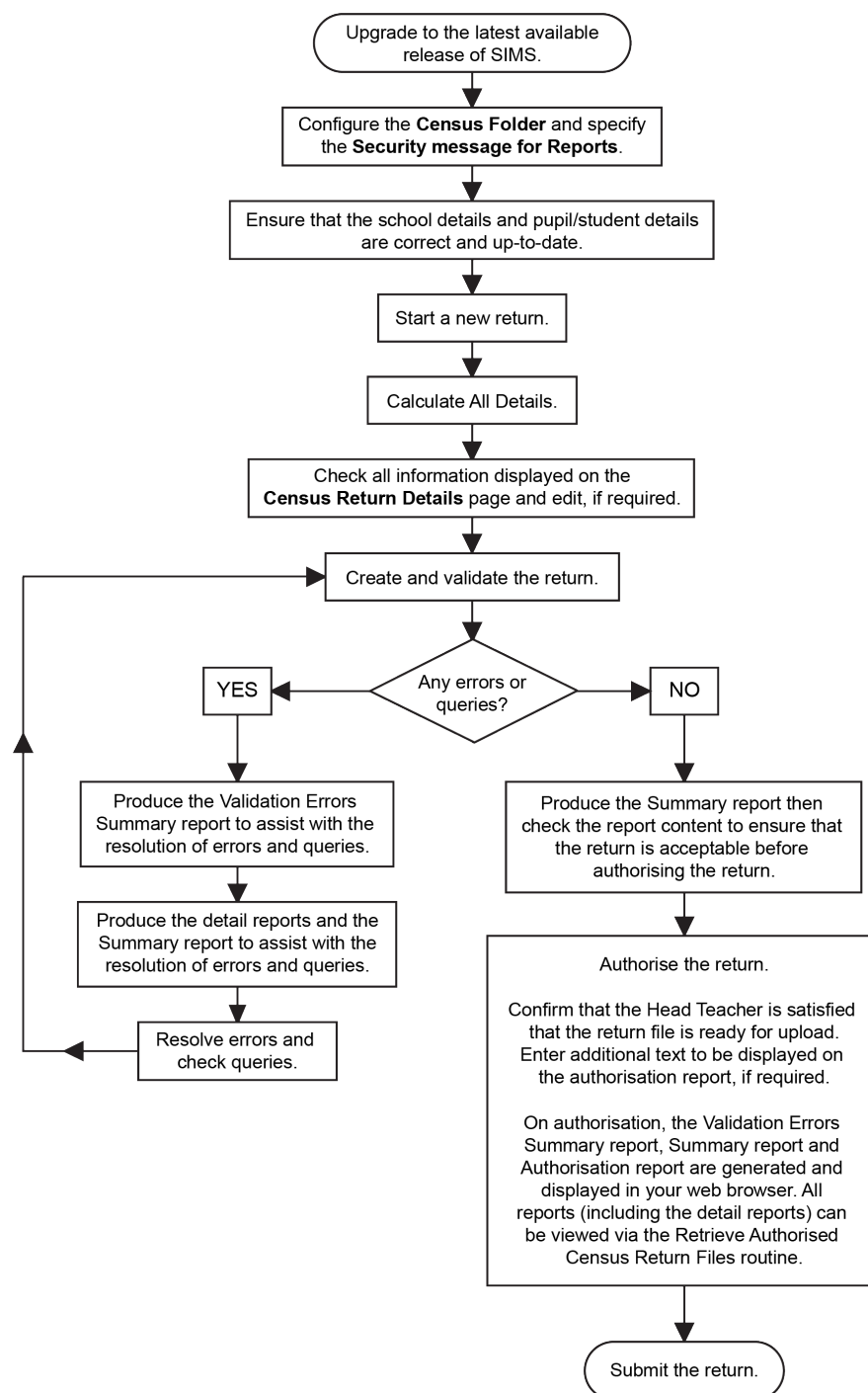
Continue to resolve the validation failures then repeat the Create and Validate routine until you are satisfied that the content of the return is correct.

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

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

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

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



02| Carrying out a Dry Run

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Why Carry out a Dry Run?

When you have upgraded to the SIMS 2017 Autumn Release (7.178), you can carry out one or more dry runs of the return.

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

Whilst a significant number of errors may be generated, many of the errors that relate to pupils, e.g. language, can be fixed quickly using the Bulk Update routine (please see *Updating Information Using the Bulk Update Routine* on page 26).

The Dry Run Process

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

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

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

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

3. Click the **New** button to display the **Census Return Details** page.
4. By default, the return **Description** is displayed as **School Census Spring 2018**. Edit the **Description** to any name that will clearly distinguish this dry run from the actual return, which will be generated later, e.g. Spring18Test.
5. Click the **Calculate All Details** button to extract the required information from the SIMS database and display the results in the various panels of the **Census Return Details** page.
6. If there is any missing or invalid data, an error message is displayed on the Status Bar. This data must be added/corrected before you can create and validate the return.
7. Click the **Create & Validate** button to start the validation process, which may take some time depending on the amount of data. Any missing or invalid data is listed in the **Validation Errors Summary** panel, located at the bottom of the page.



Additional Resources:

Detailed information about completing the individual panels on the **Census Return Details** page is available in the *Producing the School Census Spring 2018 Return* handbook applicable to your school phase.

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.

Report

Validation Errors Summary

Return Validated: 10

Validation rules failed (Errors: 4, Queries: 6)

Find

Enter Student Name, DOB (YYYY-MM-DD) or UPN for student filter

Error Search

ALL

Total of displayed rows: 10

To resolve an error, click in row to navigate to the relevant screen

Type	Sequence	Message	Location	Solution
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	1940	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 Ethnicity panel and enter First language
F	2350	Insufficient Address information provided	Name: Bains, Kiki 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: Sungai, Skaiste 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, Hugo 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, Hugo Date of Birth: 2010-02-03, Male/UPN: V823299914008	# Go to Focus Student Student details and check for duplicate pupil record
Q	2350Q	Please check: 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	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, Sophie Date of Birth: 2005-09-01, Female/UPN: M820200109034	# Go to Focus Attendance (Lesson Monitor) Display Marks and check the attendance marks

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

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

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

To assist in the resolution of any errors and queries:

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

Type	Sequence	Message	Location	Solution
F	1500	UPN missing	Name: Abraham, 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, Rosal Date of Birth: 2009-03-07, Female/UPN	# Go to Focus Student Student Details and add or issue a UPN.
F	1540	Pupils aged 5 and over Language missing or invalid	Name: Henderson, Jack Date of Birth: 2010-05-07, Male/UPN: K92329914029	# Go to Focus Student Student Details Ethnic/cultural panel and enter First language.
F	2350	Insufficient Address information provided	Name: Bana, Kiki Date of Birth: 2005-01-18, Male/UPN: H820200109012	# Go to Focus Student Student Details Ethnic/cultural panel and enter First language.
Q	1601Q	Please Check: Pupil's age is out of range for school type.	Name: Sungal, Skasstel Date of Birth: 2003-03-28, Female, Age: 12/UPN: B820200106088	# Go to Focus Student Student Details and enter pupil's date of birth.

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

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

02| Carrying out a Dry Run

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

Report			
Validation Errors Summary			
Return Validated: 10 Validation rules failed (Errors - 4, Queries - 6)			
Student Search	UPN: K32329913018 Name: Smith, Erin Date of Birth: 2010-03-07 Female	Find	Enter Student Name, DOB (YYYY-MM-DD) or UPN for student filter
Error Search	UPN: U820200107007 Name: Smith, Alex Date of Birth: 2005-05-12 Male	Find	Enter Student Name, DOB (YYYY-MM-DD) or UPN for student filter
Type	Sequence	Location	Solution
F	1500	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	Name: Reid, Rosal Date of Birth: 2009-03-07 Female/UPN	# Go to Focus Student Student Details and add or issue a UPN
F	1540	Name: Henderson, Jacki Date of Birth: 2010-05-07 Male/UPN: K32329914029	# Go to Focus Student Student Details Ethnicity panel and enter First language
F	2350	Name: Bains, Kirki Date of Birth: 2005-01-18 Male/UPN: H520200109012	# Go to Focus Student Student Details Addresses and edit pupil's address
Q	1601Q	Name: Sungail, Skaisel Date of Birth: 2003-03-28 Female, Age: 12/UPN: B820200106088	# Go to Focus Student Student Details and enter pupil's date of birth
1600Q	Please check: duplicate pupil records with the same Surname, Forename, Gender and Date of birth. Name: Bennisson, Hugo Date of Birth: 2010-02-03 Male/UPN: U820200106088		

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

Report			
Validation Errors Summary			
Return Validated: 10 Validation rules failed (Errors - 4, Queries - 6)			
Student Search	UPN: Name: Abraham, Janel Date of Birth: 2005-05-19 Female	Find	Enter Student Name, DOB (YYYY-MM-DD) or UPN for student filter
Error Search	ALL	Total displayed rows: 2	To resolve an error, click in row to navigate to the relevant screen
Type	Sequence	Message	Location
F	1500	UPN missing	Name: Abraham, Janel Date of Birth: 2005-05-19 Female/UPN
Q	2520Q	Please check: sessions possible should not be greater than 150	Name: Abraham, Janel Date of Birth: 2005-05-19 Female/UPN

- 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.

Report			
Validation Errors Summary			
Return Validated: 10 Validation rules failed (Errors - 4, Queries - 6)			
Student Search	UPN: Name: Abraham, Janel Date of Birth: 2005-05-19 Female	Find	Enter Student Name, DOB (YYYY-MM-DD) or UPN for student filter
Error Search	QUERIES	Total displayed rows: 6	To resolve an error, click in row to navigate to the relevant screen
Type	Sequence	Message	Location
Q	1601Q	UPN missing	Name: Abraham, Janel Date of Birth: 2005-05-19 Female/UPN
Q	1602Q	Please check: duplicate pupil records with the same Surname, Forename, Gender and Date of birth.	Name: Bennisson, Hugo Date of Birth: 2010-02-03 Male/UPN: U820200106088
Q	1620Q	Please check: duplicate pupil records with the same Surname, Forename, Gender and Date of birth.	Name: Bennisson, Hugo Date of Birth: 2010-02-03 Male/UPN: V82329914008
Q	2350Q	Please check: duplicate pupil records with the same Surname, Forename, Gender and Date of birth.	Name: Bennisson, Hugo Date of Birth: 2010-02-03 Male/UPN: V82329914008
Q	2520Q	Please check: sessions possible should not be greater than 150	Name: Aaron, Liz Date of Birth: 2005-09-01 Female/UPN: J820200109032
Q	2520Q	Please check: sessions possible should not be greater than 150	Name: Aaron, Sophie Date of Birth: 2005-09-01 Female/UPN: M820200109034

- 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.

Report			
Validation Errors Summary			
Return Validated: 10 Validation rules failed (Errors - 4, Queries - 6)			
Student Search	UPN: Name: Abraham, Janel Date of Birth: 2005-05-19 Female	Find	Enter Student Name, DOB (YYYY-MM-DD) or UPN for student filter
Error Search	ALL	Total displayed rows: 10	To resolve an error, click in row to navigate to the relevant screen
Type	Sequence	Message	Location
F	1500	UPN missing	Name: Abraham, Janel Date of Birth: 2005-05-19 Female/UPN
F	1500	UPN missing	Name: Reid, Rosal Date of Birth: 2009-03-07 Female/UPN
F	1540	UPN missing	Name: Henderson, Jacki Date of Birth: 2010-05-07 Male/UPN: K32329914029
F	2350	UPN missing	Name: Bains, Kirki Date of Birth: 2005-01-18 Male/UPN: H520200109012
Q	1601Q	Please check: duplicate pupil records with the same Surname, Forename, Gender and Date of birth.	Name: Sungail, Skaisel Date of Birth: 2003-03-28 Female, Age: 12/UPN: B820200106088
Q	1602Q	Please check: duplicate pupil records with the same Surname, Forename, Gender and Date of birth.	Name: Bennisson, Hugo Date of Birth: 2010-02-03 Male/UPN: U820200106088
Q	1620Q	Please check: duplicate pupil records with the same Surname, Forename, Gender and Date of birth.	Name: Bennisson, Hugo Date of Birth: 2010-02-03 Male/UPN: V82329914008

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.

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 Hosted environment, please contact your System Manager or Local Support Unit.

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

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

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

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

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

Producing Detail Reports

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

The following reports are currently available, depending on your school's phase:

- On-Roll Basic Detail Report
- SEN Report
- Address Details Report
- Free School Meal Eligibility Report
- Top up Funding Report
- Post Looked After Arrangements Report
- School Dinner Taken Report

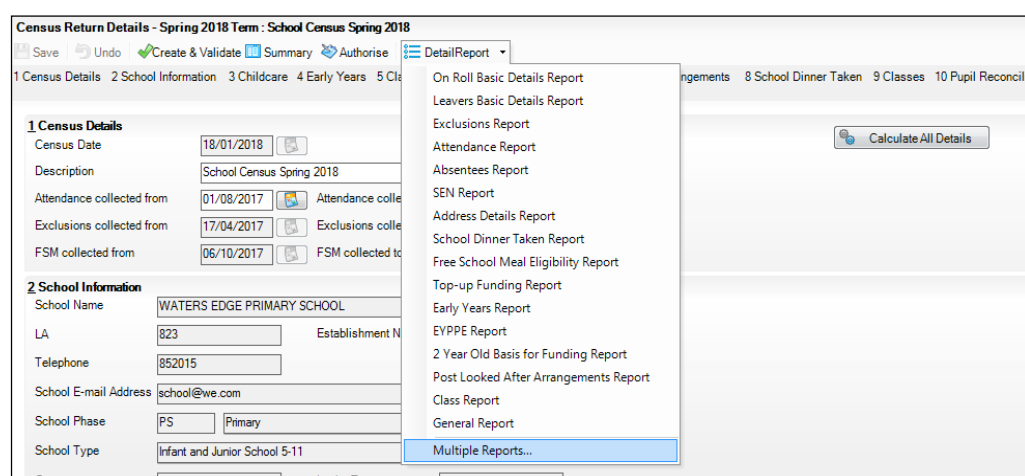
02| Carrying out a Dry Run

- General Report
- Early Years Report
- Early Years Pupil Premium Eligibility (EYPPE) Report
- 2 Year Old Basis for Funding Report
- Class Report (**applicable Primary schools only**)
- Teenage Mothers Report (**applicable to Pupil Referral Units only**)
- Attendance Report (**applicable to Primary schools and Pupil Referral Units only**)
- Absentees Report (**applicable to Primary schools and Pupil Referral Units only**)
- Leavers Basic Details Report (**applicable to Primary and Special schools, and Pupil Referral Units only**)
- Exclusions Report (**applicable to Primary and Special schools, and Pupil Referral Units only**)
- Learner Support Report (**applicable to Special and Pupil Referral Units only**).

Selecting a Single Detail Report

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

The following example displays the reports available for Primary schools.



Selecting Multiple Detail Reports

Selecting Multiple Detail Reports

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

The reports are saved automatically in the folder specified in the **Census Return for Spring Term** browser.

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

☐ Completed

03 | Preparing School Level Information

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Checking Establishment Details


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

- **Unique Reference Number (URN)**
- **School Type**
- **School Governance**
- **Intake Type.**

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

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

1 Establishment	
School Name	WATERS EDGE PRIMARY SCHOOL
LA	823 Central Bedfordshire
Establishment Number	2999
Unique Reference Number	
School Phase	Primary
School Type	Infant and Junior School 5-11
School Governance	Community
Intake Type	Comprehensive
Previous School Name	
Previous Estab Number	
Previous URN Number	
Boarding Pupils	<input type="checkbox"/> Nursery Class <input checked="" type="checkbox"/>
Head Teacher	Mrs Gillian Grosvenor
Curriculum Years	N1 6
Pupil Genders	Coeducational
Gender on entry to school	Coeducational
NC Year Start Date (dd/mm)	1 / 9
Extended Services	<input type="checkbox"/> Before school childcare and/or activities for school-age children (term-time) <input type="checkbox"/> After school childcare and/or activities for school-age children (term-time) <input type="checkbox"/> Childcare and/or activities, for school-age children during school holidays <input type="checkbox"/> Childcare integrated with a nursery education place for three and four year old...
No. of Childcare Places	0
No. of Childcare Nursery Places	0



Date Name Changed:
 Earliest DOA:
 Date Number Changed:
 Special Class or Unit: ☐

Main Contact: Mrs G Grosvenor

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

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

4. Ensure that the establishment's six digit **Unique Reference Number** (URN) is entered. The number is available via the EduBase website (<http://www.education.gov.uk/edubase/home.xhtml>).
5. If you have edited any information in the **Establishment** panel, click the **Save** button.



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 **Previous Name** and **Date Name Changed**.
- The **Previous Estab Number** and **Earliest DOA** (date of admission).
This information is used by School Census. If the establishment number (DfE number) has changed for sponsor-led Academies, historical information is not collected and the earliest date of admission is reported in the School Census.
- The **Previous URN Number** (used by other census returns) and **Date Number Changed**.
This information is used by the School Workforce Census. For all types of Academies opened in the collection period, the date that the establishment's URN changed is used to determine when the academy was formed. Historical information is not collected from before the date the URN changed.



Checking School Telephone and Email Information

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

- School **Email** Address
- School **Telephone** Number.

1. Select **Focus | School | School Details** to display the **School Details** page.
2. Click the **Contact Details** hyperlink to display the **Contact Details** panel.

3 Contact Details

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

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

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

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




Checking School Childcare Details

The childcare details can be recorded via the **Focus** menu, enabling the information to be maintained at any time throughout the year.

1. Select **Focus | School | School Details** to display the **School Details** page.
2. Click the **Childcare** hyperlink to display the **Childcare** panel, where the current childcare details are displayed.

6 Childcare

Type	On Site	Signposted	Opening Time	Closing Time	No of Childcare Places	Provider	Other Schools	Weeks Open	Notes	 Open
Before School Childcare	Yes	No	07:00		40	School	Yes		Parent and...	
After School Childcare	Yes	No		18:00	25	School	No			
Holiday Childcare	Yes	Yes, form...	08:30	16:30	40	Other (non-s...	Yes	5		
Under Fives Childcare	No	No								

3. Double-click one of the four existing records to display the **Update Childcare Details** dialog. Alternatively, highlight a record then click the **Open** button.

Update Childcare Details

Childcare Details

Type:

On Site:

Signposted:

Opening Time: : hh:mm (24 hrs)

Closing Time: : hh:mm (24 hrs)

No of Childcare Places:

Provider:

Other Schools:

Weeks Open:

Notes:

4. Enter the applicable details.

IMPORTANT NOTE: To avoid validation errors, the **Site** and **Signposted** options must be specified for all four childcare types.

- **Type** - based on the record you have opened, the type of childcare being provided is displayed automatically. The four types of childcare collected for the return are:
 - **Before School Childcare**
 - **After School Childcare**
 - **Holiday Childcare**
 - **Under Fives Childcare.**
- **Site** - select as applicable option from the drop-down list:
 - **Yes** - select this option if childcare is being provided on the school premises.
 - **No** - select this option if childcare is not being provided on the school premises.
- **Signposted** - one of the following options must always be selected from the drop-down list:
 - **Yes, formal arrangements including transport** - select this option if your school has formal arrangements with another provider that provides childcare for your pupils, including transport to their site.
 - **Yes, list of providers that pick up from school** - select this option if a list of local providers that will pick up pupils from the school to help parents is provided.
 - **No**
 - **Not Known.**
- **Opening Time** - enter the time that the service becomes available (not applicable to after school care).

NOTE: Ensure that the time is entered in 24 hour format. A colon should be entered between the hours and the minutes, e.g. 07:00.

- **Closing Time** - enter the time that the service closed (not applicable to before school care).

NOTE: Ensure that the time is entered in 24 hour format. A colon should be entered between the hours and the minutes, e.g. 17:30.

- **Number of Childcare Places** - enter the maximum number of childcare places that the service can provide.
- **Provider** - select the description from the drop-down list that most accurately describes the provider of the service:
 - **School**
 - **School in Partnership** (with another provider)
 - **Other (non-school) Provider.**

- **Other Schools** - is the service made available to children from other schools? Select as applicable from the drop-down list:
 - **Yes**
 - **No**
 - **Unknown.**
 - **Weeks Open** - enter the number of weeks for which childcare is provided (applicable to holiday and under-fives childcare only).
 - **Notes** - notes can be added and then edited later, if required (not collected in for the return).
5. Click the **OK** button to return to the **School Details** page.
 6. Repeat the process to edit other records, if required.
- Childcare provisions are included in the General detail report, which is available from the **Detail Report** drop-down list via **Routines | Statutory Returns | School Census**.

Checking Special School Information

Applicable to Special schools only

The following Special school information is collected for the return:

- Special school **Organisation**
 - **Maximum Day Pupils**
 - **Maximum Boarding Pupils**
 - **Minimum Age** for **Male students**
 - **Minimum Age** for **Female students**
 - **Maximum Age** for **Male students**
 - **Maximum Age** for **Female students**
 - **SEN Provision** (formerly stage)
1. Select **Focus | School | School Details** to display the **School Details** page.
 2. Click the **Special Schools Information** hyperlink to display the **Special Schools Information** panel.

5 Special School Information

Organisation: Day Pupils (mainly) Maximum Day Pupils: 165 Maximum Boarding Pupils: 0

Male students: Minimum Age: 5 Maximum Age: 19 Female students: Minimum Age: 5 Maximum Age: 19

Provision:

Rank	Provision
1	Speech, Language and Communication Difficulties
2	Hearing Impairment

New Delete

Move Up Move Down

3. Check that all fields in the **Special Schools Information** panel are populated with the correct information:
 - Ensure that the correct **Organisation** is selected (**Day Pupils (mainly)**, **Boarding Pupils (mainly)** or **Hospital Special School**). Reselect from the drop-down list, if necessary.
 - Ensure that all minimum and maximum values are displayed correctly. Edit if necessary.
 - Ensure that any SEN **Provision(s)** listed are correct.
 - If a provision description is wrong, highlight the record then click the **Delete** button. The record is deleted immediately.
 - To add a SEN **Provision**, click the **New** button then select the required **Provision** from the displayed list. Click the **OK** button to return to the **Special School Information** panel.
 - To rank the SEN **Provision** in the required order, highlight a record then click either the **Move Up** or **Move Down** button.
4. Click the **Save** button, if you have made any changes.



Collating Admission Appeals Information

Applicable to Foundation, Voluntary Aided schools and Academies only

NOTE: Academies that were Voluntary Aided or Foundation Schools at the time that the appeals were lodged should complete this panel.

The admissions appeals information is collected from Primary/Middle deemed Primary and All-Through schools that are responsible for their own admission appeals (i.e. Voluntary Aided and Foundation schools).

Data is required for appeals in the academic year 2016/2017, where a refusal to admit a pupil into the school was for a place during the academic year 2017/2018.

The following admission appeals information is collected in the return:

- Admission appeals lodged
- Admission appeals withdrawn
- Admission appeals heard by independent admissions committee
- Admission appeals upheld by independent admissions committee
- Admission appeals rejected by independent admissions committee.

Admission appeals are dealt with by the LA and consequently there is no specific functionality in SIMS relating to this area of admissions. Therefore, the information must be entered manually in the **Admission Appeals** and the **Infant Appeals** panels when completing the School Census Spring 2018 Return (via **Routines | Statutory Returns | School Census**).

14 Primary Admissions Appeals		Independent Admissions Committee	
Foundation Schools/Voluntary Aided Schools/Academies must complete this section (this does not include AP Academies, AP Free Schools, Academy Special Schools)			
Lodged	<input style="width: 50px;" type="text" value="0"/>	Heard	<input style="width: 50px;" type="text" value="0"/>
Withdrawn	<input style="width: 50px;" type="text" value="0"/>	Upheld	<input style="width: 50px;" type="text" value="0"/>
		Rejected	<input style="width: 50px;" type="text" value="0"/>

The infant appeals information is collected from Primary and All-Through schools that are responsible for their own admission appeals (i.e. Voluntary Aided and Foundation schools).

Any infant appeals should be included in the overall count of appeals entered in the **Admission Appeals** panel. They should also be recorded separately in the **Infant Appeals** panel.

13 Infant Admissions Appeals		Independent Admissions Committee	
Foundation Schools/Voluntary Aided Schools/Academies must complete this section.(this does not include AP Academies, AP Free Schools, Academy Special Schools)			
Lodged	<input type="text" value="0"/>	Heard	<input type="text" value="0"/>
Withdrawn	<input type="text" value="0"/>	Upheld	<input type="text" value="0"/>
		Rejected	<input type="text" value="0"/>

Ensure that the admission appeals information is easily accessible to the member of staff who will be completing the return.



04 | Preparing Pupil Level Information

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Checking Pupil Details

Before starting the School Census return, ensure that all current pupils are recorded in SIMS and that as far as possible, the information is up-to-date and accurate. Ensure that:

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

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

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

The following sections provide additional information and specific instructions on checking and completing Pupil Level data. Some of this data can be checked/updated using the Bulk Update routine (please see *Updating Information Using the Bulk Update Routine* on page 26).

When you have upgraded to the SIMS 2017 Autumn Release (SIMS 7.178), it is strongly recommended that one or more dry runs are carried out in order to identify the validation errors and queries that need to be resolved.

Updating Information Using the Bulk Update Routine

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

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

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

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

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

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

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

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

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

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

Update Data Item

Data Item

Effective Date

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

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

Bulk update Student

Search Browse

Links Help Close

Bulk Update

Student Population

Group Type Year Group

Group <ANY>

Effective Date 26/09/2017

Update Data Item

Data Item First Language

Effective Date 26/09/2017

04 | Preparing Pupil Level Information

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

Bulk Update First Language (as from 26/09/2017) - Year Group: <ANY> (as at 26/09/2017)

Save Undo Print Help Unpin Close

1 Members

Name	Year Group	Assigned	Acholi	Adangme	Afar-Saho	Afrikaans	Akan/Twi-Fante	Albanian/Shqip	Alur
Aaron, Chris	3	English							
Aaron, Liz	3	English							
Aaron, Sophie	3	English							
Abdullah, Tamwar	R	English							
Abhra, Abjit	N2	Bengali							
Abhra, Alisha	N2	Bengali							
Abhra, Neel	N2	Bengali							
Abraham, Jane	4	English							
Ackton, Stan	N2	English							
Ackton, Stephen	3	English							
Acton, Jordan	5	English							
Acton, Samantha	6	English							
Adams, Adam	4	English							
Adams, Laura	2	English							
Adasheji, Mohammed	3	Bengali							
Adebayor, Emmanuel	5	English							
Akeman, Rebecca	1	English							
Americana, Kari	5	English							
Amnar, Tarak	2	Turkish							
Amoso, Rosanna	6	Italian							
Amoso, Silv	6	Italian							
Amoso, Stephanie	6	Italian							
Anderson, Neo	4	English							
Andrews, Jasmine	5	English							
Andrews, Paul	6	English							
Angler, Harry	6	English							
Ansell, Alfie	3	English							
Ansell, Annie	3	English							
Ansell, Archie	3	English							
Ariano, Pietro	5	English							
Arkell, Isis	1	English							
Total	436		436	0	0	0	0	0	0

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

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

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

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

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

1 Members										
Name	Year Group	Assigned	Jha/Bhutanese	Ebira	Edo/Bini	Efik-Ibibio	English	Esan/Ishan	Estonian	Ewe
Aaron, Chris	3	English					✓			
Aaron, Liz	3	English					✓			
Aaron, Sophie	3	English					✓			
Abdullah, Tamwar	R	English					✓			
Abhra, Abjit	N2	Bengali								
Abhra, Alisha	N2	Bengali								
Abhra, Neel	N2	Bengali								
Abraham, Jane	4	English					✓			
Ackton, Stan	N2	English					✓			
Ackton, Stephen	3	English					✓			
Acton, Jordan	5	English					✓			
Acton, Samantha	6	English					✓			
Adams, Adam	4	English					✓			
Adams, Laura	2	English					✓			
Adasheji, Mohammed	3	Bengali								
Adebayor, Emmanuel	5	English					✓			
Akeman, Rebecca	1	English					✓			
Americana, Kari	5	English					✓			
Amnar, Tarak	2	Turkish								
Amoso, Rosanna	6	Italian								
Amoso, Silv	6	Italian								
Arkell, Isis	1	English					✓			
Total	436		436	0	0	0	344	0	1	

All the cells within that column are populated with ticks.

2. Edit the exceptions by clicking in the cell associated with the individual pupil and their status, e.g. the first language of Neel Abhra is Estonian.

1 Members										
Name	Year Group	Assigned	Jha/Bhutanese	Ebira	Edo/Bini	Efik-Ibibio	English	Esan/Ishan	Estonian	Ewe
Aaron, Chris	3	English					✓			
Aaron, Liz	3	English					✓			
Aaron, Sophie	3	English					✓			
Abdullah, Tamwar	R	English					✓			
Abhra, Abjit	N2	English					✓			
Abhra, Alisha	N2	English					✓			
Abhra, Neel	N2	Estonian							✓	
Abraham, Jane	4	English					✓			
Ackton, Stan	N2	English					✓			
Ackton, Stephen	3	English					✓			
Acton, Jordan	5	English					✓			
Acton, Samantha	6	English					✓			
Adams, Adam	4	English					✓			
Adams, Laura	2	English					✓			
Adasheji, Mohammed	3	English					✓			
Adebayor, Emmanuel	5	English					✓			
Akeman, Rebecca	1	English					✓			
Americana, Kari	5	English					✓			
Amnar, Tarak	2	English					✓			
Amoso, Rosanna	6	English					✓			
Amoso, Silv	6	Italian					✓			
Arkell, Isis	1	English					✓			
Total	436		436	0	0	0	346	0	2	

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

Bulk Updating Data for a Selection of Pupils

There are two methods for selecting a number of pupils.

Entering a Value for a Selection of Pupils

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

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

Entering a Value for Sequentially Listed Pupils

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

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

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

Recording Leavers and Re-Admissions

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

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

Recording a Leaver

The **Date of Leaving** is collected for all schools with the exception of Nursery schools.

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

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

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

Name	Year Group	Class	Adm. No.	Date of Admission	Date of Leaving	Reason for Leaving	Destination
Aaron, Chris	6	6KH	001102	01/09/2009			
Aaron, Liz	6	6KH	001103	01/09/2009			
Aaron, Sophie	6	6VC	001104	01/09/2009			
Abdullah, Tamwar	3	3TO	001275	01/09/2012			
Abhra, Abit	2	2JB	001336	01/09/2013			
Abhra, Alaha	2	2JB	001337	01/09/2013			

- Highlight the pupils you wish to record as leavers, then click the **Select** button. The selected pupils are displayed in the **Students** panel.

1 Leaving Information

Date of Leaving: Reason for leaving: End of phase transfer - Maintained school Assign to All

Destination after Leaving: Assign to Selected

Destination Institution: Browse X

Destination Expected Start Date: Grounds for Removal: End of phase transfer - Maintained school

2 Students

Name	Year Group	Class	Adm. No.	Date of Admission	Date of Leaving	Reason for Leaving	Destination	Institution	Expected Star...	Grounds	Remove	Clear
Abdullah, Tamwar	4	4ES	001275	01/09/2012								

- In the **Leaving Information** panel, enter the **Date of Leaving** (collected for the return) or select the relevant date from the Calendar.
The date of leaving should be the date that the pupil is actually leaving the school, unless they are transferring from Junior/Primary phase to Secondary phase because Local Authorities normally specify the dates to be used for school transfers so that they match. For example, some authorities prefer not to have any gaps between dates and may suggest a date of leaving (the old school) of 4 September and the date of admission (into the new school) of 5 September. If you are in any doubt, please contact your Local Authority for advice.
- Select the **Reason for Leaving** from the drop-down list, e.g. **End of phase transfer - Maintained school**, then either:
 - highlight the pupils to whom this information applies (using the **Ctrl** or **Shift** keys) and click the **Assign to Selected** button; or
 - if the information applies to all the pupils in the list, click the **Assign to All** button.
- Enter the **Destination after Leaving**, if known, then use the **Assign to All** or **Assign to Selected** options, as required.
- Specify the **Destination Institution**, if known.
 - Click the **Browse** button (adjacent to the **Destination Institution** field) to display the **School Browse** dialog.
 - Search** for and then select the relevant institution. Alternatively, click the **New** button to add a new institution.
 - Click the **OK** button(s) to return to the **Leaving Information** panel.
 - Use the **Assign to All** or **Assign to Selected** options, as required.

9. Enter the **Destination Expected Start Date** (or select the relevant date from the Calendar), then use the **Assign to All** or **Assign to Selected** options, as required.
10. Select the **Grounds for Removal** from the drop-down list, e.g. **E - Distance**, then use the **Assign to All** or **Assign to Selected** options, as required.
To comply with the Children Missing in Education legislation, schools are required to record this information for all pupils on leaving the school.
11. To remove a pupil from the **Students** list, highlight their record, then click the **Remove** button.
12. To correct details entered in error, highlight the applicable pupil, then click the **Clear** button. This removes the details drawn from the **Learning Information** panel for the selected pupil only. Re-enter the information as required.
13. Click the **Save** button.



Re-Admitting a Pupil

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

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

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

1. Select **Focus | Pupil | Pupil Details** to display the **Find Student** browser.
2. Click the **New** button to display the **Add Student** page. It is necessary to enter limited information here as you know that the person already exists.
3. Click the **Continue** button to display a list of **Matched People**, based on the criteria entered on the **Add Pupil** page.
4. Highlight the required pupil then click the **Open** button. The following warning message is displayed:
The selected student is a leaver. Do you want to re-admit the student?
5. Click the **Yes** button if you are certain that this is the pupil who should be re-admitted. Their details are displayed on the **Student Details** page.
6. Complete the mandatory fields (**Date of birth, Gender, Year Group, Enrolment Status, Year Taught In** and **Admission Date**) and check any other details that may have changed since they were last on-roll, such as their address.

7. Check that the original **UPN** is displayed.
If it did not previously exist, generate a new **UPN** by clicking the button adjacent to the **UPN** field to display the **Issue UPN** dialog.
Select either the **Issue Permanent** or **Issue Temporary UPN** radio button then click the **OK** button to return to the **Registration** panel.
The temporary/permanent UPN is issued on save.
8. Click the **Save** button to re-admit the pupil.

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

☐ Completed

Deleting Unwanted Pupil Records

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

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

☐ Completed

Checking a Pupil's Basic Details

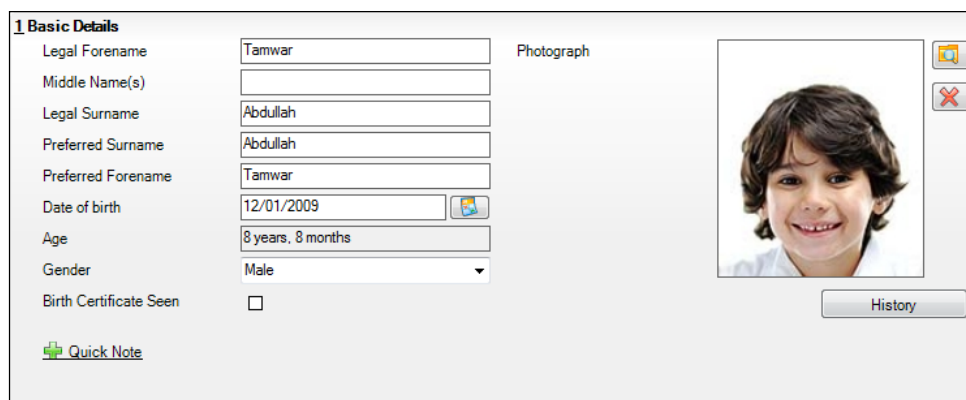
Ensure that basic details for all pupils are correct. It may be necessary to make changes for a number of reasons, e.g. to correct inaccurately entered information, legal adoption, change of legal surname, etc.

The following information is collected in the return:

- **Legal Forename** (mandatory information in SIMS)
- **Middle Names**
- **Legal Surname** (mandatory information in SIMS)
- **Former Surname**
- **Preferred Surname** (mandatory information in SIMS)
- **Gender** (mandatory information in SIMS)
- **Date of Birth** (mandatory information in SIMS).

04 | Preparing Pupil Level Information

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



The screenshot shows the 'Pupil Details' form. On the left, under the heading '1 Basic Details', there are several input fields: 'Legal Forename' (filled with 'Tamwar'), 'Middle Name(s)' (empty), 'Legal Surname' (filled with 'Abdullah'), 'Preferred Surname' (filled with 'Abdullah'), 'Preferred Forename' (filled with 'Tamwar'), 'Date of birth' (filled with '12/01/2009'), 'Age' (filled with '8 years, 8 months'), 'Gender' (a dropdown menu showing 'Male'), and 'Birth Certificate Seen' (an unchecked checkbox). To the right of these fields is a 'Photograph' section containing a photo of a young boy with dark hair, a 'History' button, and a red 'X' icon. At the bottom left of the form is a 'Quick Note' icon and label.

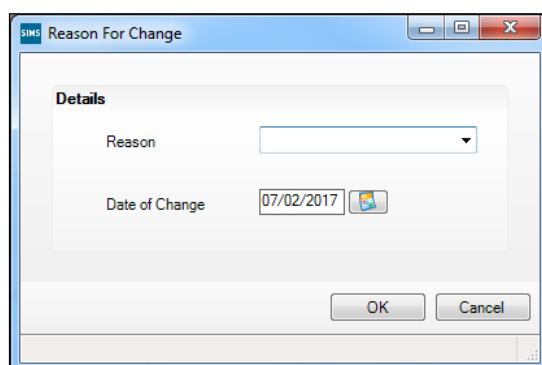
3. Check that all the details displayed in the **Basic Details** panel are up-to-date and accurate, paying particular attention to the data collected in the return (listed previously).
If a legal change (rather than a correction) is made to the **Legal Forename, Middle Name(s) or Legal Surname**, a **Reason** and **Date of Change** must be recorded.
4. If you have made any changes, click the **Save** button.

☐ Completed

Recording a Pupil's Change of Surname

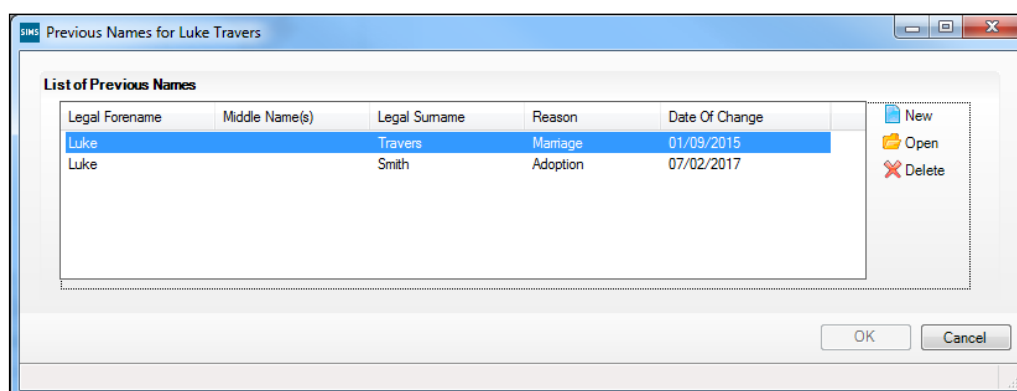
It is a requirement of the return that a history of pupils' previous surname(s) is recorded.

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



The screenshot shows a dialog box titled 'Reason For Change'. It has a 'Details' section with a 'Reason' dropdown menu and a 'Date of Change' field (filled with '07/02/2017'). At the bottom are 'OK' and 'Cancel' buttons.

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



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

 **Completed**

Checking Registration Details

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

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

Checking Enrolment Status, Admission Date and Boarder Status

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

2 Registration

Class 4ES **House**
Year Group Year 4 **Year Taught In** Curriculum Year 4
Enrolment Status Single Registration **Boarder Status** Not a Boarder
Admission Date 01/09/2012 **Admission Number** 001275
Former UPN **Attendance Mode** All day
UPN N823299911001 **Local UPN**
Part Time Details

Start Date	End Date
01/09/2012	31/12/2012

Early Years Attendance Patterns

Start date	End date	Mon	Tue	Wed	Thu	Fri	Sat	Sun
01/09/2012	21/12/2012	PROV1	PROV1	PROV1	PROV1	PROV1		

Actions: New, Open, Delete (for Part Time Details and Early Years Attendance Patterns)
History

NOTE: The **Early Years Attendance Patterns** section of the **Registration** panel is visible to Primary schools only.

4. Check the pupil's **Enrolment Status**. Select the correct enrolment status from the drop-down list, if required.
5. Ensure that the **Admission Date** is entered correctly (dd/mm/yyyy). Edit the date or click the **Calendar** button and select a different date, if required.
6. Ensure that the **Year Taught In** field displays the actual National Curriculum year in which the pupil is taught the majority of the time (please see *Checking National Curriculum Year Groups* on page 41).
7. Check the pupil's **Boarder Status**. Select the correct boarder status from the drop-down list, if required.
8. Click the **Save** button.

 **Completed**

Checking Unique Pupil Numbers

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

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

NOTE: The Early Years Attendance Patterns section of the Registration panel is visible to Primary schools only.

2 Registration

Class 4ES **House**

Year Group Year 4 **Year Taught In** Curriculum Year 4

Enrolment Status Single Registration **Boarder Status** Not a Boarder

Admission Date 01/09/2012 **Admission Number** 001275

Former UPN **Attendance Mode** All day

UPN N823299911001 **Local UPN**

Part Time Details

Start Date	End Date
01/09/2012	31/12/2012

Early Years Attendance Patterns

Start date	End date	Mon	Tue	Wed	Thu	Fri	Sat	Sun
01/09/2012	21/12/2012	PROV1	PROV1	PROV1	PROV1	PROV1		

Buttons: New, Open, Delete, History

A unique UPN should be entered in the **UPN** field. If the UPN entered has an invalid format, the field turns red indicating that the UPN is incorrect and should be re-entered.

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



Generate UPN button

SIMS Issue UPN

Issue Permanent UPN ☐

Issue Temporary UPN ☐

None ☒

Buttons: OK, Cancel

5. Select either the **Issue Permanent UPN** or **Issue Temporary UPN** radio button.
6. Click the **OK** button to return to the **Registration** panel.

7. Click the **Save** button to save any changes. The UPN is generated automatically when the record is saved.

NOTE: A pupil who is adopted after being allocated a UPN is often issued with a new permanent UPN. However, the exact process may vary depending on the circumstances and the guidance issued by your LA/DfE. For information about issuing a new UPN for an adopted child, please seek advice from your LA, if applicable.

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



Checking Unique Learner Numbers

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

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

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

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

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

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

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

2 Registration

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

History

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

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

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

 **Completed**

Checking/Correcting Part-Time Pupil Information

The collection of part-time details is mainly relevant to Nursery schools (or schools with nursery age children) and Primary schools with Reception years. However, any pupil can be marked as part-time if their attendance is anything less than 10 sessions per week.

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

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

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

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

2 Registration

<u>Class</u>	4ES	<u>House</u>	
<u>Year Group</u>	Year 4	<u>Year Taught In</u>	Curriculum Year 4
<u>Enrolment Status</u>	Single Registration	<u>Boarder Status</u>	Not a Boarder
<u>Admission Date</u>	01/09/2012	<u>Admission Number</u>	001275
<u>Former UPN</u>		<u>Attendance Mode</u>	All day
<u>UPN</u>	N823299911001	<u>Local UPN</u>	

Part Time Details

Start Date	End Date
01/09/2012	31/12/2012

New Open Delete History

Early Years Attendance Patterns

Start date	End date	Mon	Tue	Wed	Thu	Fri	Sat	Sun
01/09/2012	21/12/2012	PROV1	PROV1	PROV1	PROV1	PROV1		

New Open Delete

NOTE: The **Early Years Attendance Patterns** section of the **Registration** panel is visible to Primary schools only. If applicable, Primary schools should complete the **Early Years Attendance Patterns**, as this will help when updating Hours at Setting.

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

SIMS Add Part-time Attendance

Start Date: 29/09/2017

End Date: 31/08/2018

OK Cancel

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

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

 **Completed**

Checking National Curriculum Year Groups

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

The following table shows the Curriculum Year that pupils in England are expected to be taught in, according to their date of birth (during the academic year 2017/2018). This table is provided for reference only.

Curriculum Year the Pupil would Normally be Taught in	Date of Birth Range	Age Range
	After 31/08/2015	1 and under
N1	01/09/2014 to 31/08/2015	2 – 3
N2	01/09/2013 to 31/08/2014	3 – 4
R	01/09/2012 to 31/08/2013	4 – 5
1	01/09/2011 to 31/08/2012	5 – 6
2	01/09/2010 to 31/08/2011	6 – 7
3	01/09/2009 to 31/08/2010	7 – 8
4	01/09/2008 to 31/08/2009	8 – 9
5	01/09/2007 to 31/08/2008	9 – 10
6	01/09/2006 to 31/08/2007	10 – 11
7	01/09/2005 to 31/08/2006	11 – 12
8	01/09/2004 to 31/08/2005	12 – 13
9	01/09/2003 to 31/08/2004	13 – 14
10	01/09/2002 to 31/08/2003	14 – 15
11	01/09/2001 to 31/08/2002	15 – 16
12	01/09/2000 to 31/08/2001	16 – 17
13	01/09/1999 to 31/08/2000	17 – 18
	Before 31/08/1999	19+

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

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



Additional Resources:

Managing Pupil/Students handbook
Setting up and Administering SIMS handbook

Checking the Pupil's Year Taught In Record

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

2 Registration

<u>Class</u>	4ES	<u>House</u>	
<u>Year Group</u>	Year 4	<u>Year Taught In</u>	Curriculum Year 4
<u>Enrolment Status</u>	Single Registration	<u>Boarder Status</u>	Not a Boarder
<u>Admission Date</u>	01/09/2012	<u>Admission Number</u>	001275
<u>Former UPN</u>		<u>Attendance Mode</u>	All day
<u>UPN</u>	N823299911001	<u>Local UPN</u>	

<u>Part Time Details</u>		New Open Delete
Start Date	End Date	
01/09/2012	31/12/2012	

<u>Early Years Attendance Patterns</u>		New Open Delete
Start date	End date	
01/09/2012	21/12/2012	
Mon	Tue	Wed
PROV1	PROV1	PROV1
Thu	Fri	Sat
PROV1	PROV1	

[History](#)

NOTE: The Early Years Attendance Patterns section of the Registration panel is visible to Primary schools only.

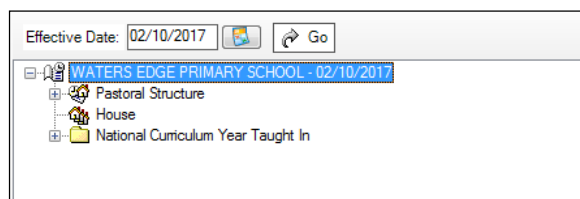
4. Ensure that the **Year Taught In** field displays the actual National Curriculum year in which the pupil is taught the majority of the time. If necessary, select the correct year from the drop-down list.

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

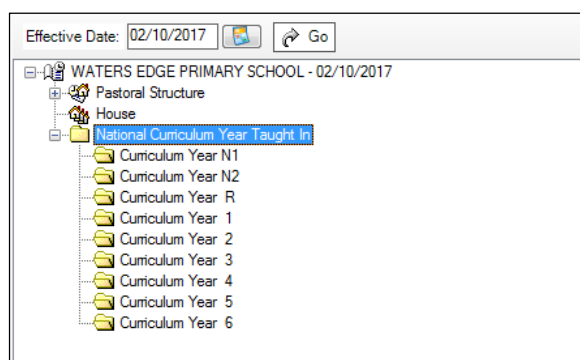
Checking the Year Taught In via the Pastoral Structure by Curriculum Year

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

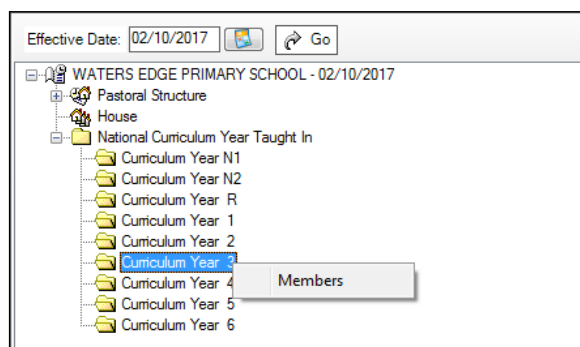
- Click the **Go** button.



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



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



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

Allocate Students/Applicants : Curriculum Year 3

Effective Date Range
☒ From effective date to end of the academic year ()
☐ Over the whole academic year (01/09/2017 - 31/08/2018)

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

Members Print Actions

Name	Gender	Year Group	Reg Group	DOB	N1	N2	R	1	2	3	4	5	6
Abhra, Abjit	Male	Year 3	3TO	20/11/2009						✓			
Abhra, Alisha	Female	Year 3	3TO	20/11/2009						✓			
Abhra, Neel	Male	Year 3	3CB	20/11/2009						✓			
Ackton, Stan	Male	Year 3	3CB	22/03/2010						✓			
Andrews, Josef	Male	Year 3	3CB	26/03/2010						✓			
Bailey, Eve	Female	Year 3	3TO	17/04/2010						✓			
Balinski, Cyla	Female	Year 3	3TO	14/03/2010						✓			
Balinski, Fil	Male	Year 3	3TO	14/06/2010						✓			
Balinski, Iwa	Female	Year 3	3CB	14/03/2010						✓			
Bennison, Hugo	Male	Year 3	3CB	03/02/2010						✓			
Bennison, Hugo	Male	Year 3	3CB	03/02/2010						✓			
Total					0	0	0	0	0	62	0	0	0

OK Cancel

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

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

The following graphic shows that one pupil is taught in Year 4.

Effective Date Range
☐ From effective date to end of the academic year ()
☒ Over the whole academic year (01/09/2017 - 31/08/2018)

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

Members Print Actions

Name	Gender	Year Group	Reg Group	DOB	N1	N2	R	1	2	3	4	5	6
Abhra, Abjit	Male	Year 3	3TO	20/11/2009						✓			
Abhra, Alisha	Female	Year 3	3TO	20/11/2009						✓			
Abhra, Neel	Male	Year 3	3CB	20/11/2009						✓			
Ackton, Stan	Male	Year 3	3CB	22/03/2010						✓			
Andrews, Josef	Male	Year 3	3CB	26/03/2010						✓			
Bailey, Eve	Female	Year 3	3TO	17/04/2010							✓		
Balinski, Cyla	Female	Year 3	3TO	14/03/2010						✓			
Balinski, Fil	Male	Year 3	3TO	14/06/2010						✓			
Balinski, Iwa	Female	Year 3	3CB	14/03/2010						✓			
Bennison, Hugo	Male	Year 3	3CB	03/02/2010						✓			
Bennison, Hugo	Male	Year 3	3CB	03/02/2010						✓			
Total					0	0	0	0	0	61	1	0	0

OK Cancel

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

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

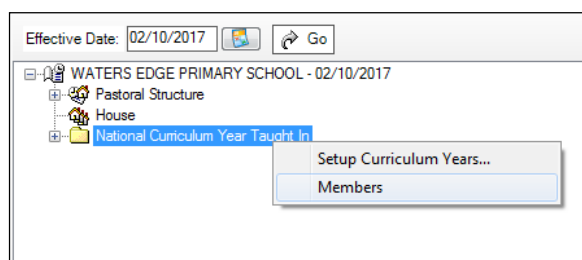
1. Select **Focus | School | Pastoral Structure | Current Structure** to display the **Current Academic Year Pastoral Structure** page.
2. Click the **Go** button.

Effective Date: 02/10/2017 Go

- WATERS EDGE PRIMARY SCHOOL - 02/10/2017
 - Pastoral Structure
 - House
 - National Curriculum Year Taught In

04| Preparing Pupil Level Information

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



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

Effective Date Range

☒ From effective date to end of the academic year () Over the whole academic year (01/09/2017 - 31/08/2018)

Student Status

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

Members

Name	Gender	Year Group	Reg Group	DOB	N1	N2	R	1	2	3	4	5	6
Abdullah, Tawwar	Male	Year 4	4ES	12/01/2009							✓		
Abhra, Abjit	Male	Year 3	3TO	20/11/2009						✓			
Abhra, Alisha	Female	Year 3	3TO	20/11/2009						✓			
Abhra, Neel	Male	Year 3	3CB	20/11/2009						✓			
Abhra, Shaquib	Male	Year N2	AM	17/12/2013		✓							
Ackton, Charlotte	Female	Year N2	AM	10/02/2014		✓							
Ackton, Stan	Male	Year 3	3CB	22/03/2010						✓			
Adams, Laura	Female	Year 6	6VC	03/03/2007									✓
Adams, Nancy	Female	Year 1	ELM	18/12/2011									
Adams, Sadie	Female	Year R	ELM	20/03/2013			✓						
Akeman, Rebecca	Female	Year 5	5BB	18/09/2007								✓	
Total					8	20	59	59	59	62	59	60	59

OK Cancel

- Ensure that the **Effective Date Range** is changed to **Over the whole academic year** by selecting the applicable radio button.
By default, the records are displayed in alphabetical surname order. Sorting the names in year group order assists in locating pupils who do not have a **Year Taught In** selected.

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

Effective Date Range

☐ From effective date to end of the academic year (☒ Over the whole academic year (01/09/2017 - 31/08/2018)

Student Status

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

Members

Print Actions

Name	Gender	Year Group	Reg Group	DOB	N1	N2	R	1	2	3	4	5	6
Adams, Nancy	Female	Year		2/2011									
Alala, Candis	Female	Year		0/2011									
Barden, Olivia	Female	Year	PINE	15/02/2012				✓					
Bateman, Vincent	Male	Year 1	ASH	20/01/2012				✓					
Bhati, Aini	Female	Year 1	PINE	17/04/2012				✓					
Boian, Claudiu	Male	Year 1	ASH	04/03/2012				✓					
Brown, Ingrid	Female	Year 1	ELM	14/12/2011				✓					
Broz, Konrad	Male	Year 1	OAK	12/01/2012				✓					
Cairns, Matthew	Male	Year 1	PINE	04/04/2012				✓					
Canzano, Michael	Male	Year 1	OAK	20/09/2011				✓					
Carlton, Eleanor	Female	Year 1	ELM	15/05/2012				✓					
Total					8	20	59	59	59	62	59	60	59

OK Cancel

***TIP:** To sort the pupil names in date of birth order, right-click the **DOB** column heading then select **Sort By** from the pop-up menu.*

- Indicate which year the pupils with missing data are taught in by clicking the appropriate cell in the grid.
- Ensure that all pupils have been allocated a year taught in and then click the **OK** button to return to the **Current Academic Year Pastoral Structure** page.
- Click the **Save** button.

 **Completed**

Checking Home Address Information

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

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

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

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

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

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

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

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

 **Completed**

Checking Free School Meals Eligibility

The number of free school meals taken on census day by pupils who are eligible for Free School Meals, must be entered manually in the **General** panel on the **Census Return Details** page when completing the return.

This information and other free school meal eligibility related data is collected in the return.

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

NOTE for schools with Reception, Year 1 and Year 2:

All pupils in Reception, Year 1 and Year 2 are offered a meal regardless of whether they are eligible for free school meals.

Pupils in Reception, Year 1 and Year 2 must only be recorded as eligible for a free school meal if they meet the criteria for free school meals.

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

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

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

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

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

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

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

☐ **Completed**

Checking Ethnic and Cultural Information

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

- **Ethnicity**
- **First Language**
 - A First Language other than English should be recorded where a pupil was exposed to the language during early development and continues to be exposed to this language at home or in the community.
 - If the child was exposed to more than one language (which may include English) during early development, the language other than English should be recorded, irrespective of the pupil's proficiency in English.
- **Country of Birth.**
- Nationality (**Nation**).
- **Proficiency in English** is collected only where the pupil's language code indicates that the pupil's first language is other than English.

Teachers assess these pupils according to the impact that their Proficiency in English has on their ability to engage with full class activities (and the corresponding level of support that the pupil requires).

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

8 Ethnic/Cultural

Ethnicity White - English Ethnic Data Source Provided by the parent

First Language English Religion Christian

First Language Source English Additional Language No

Asylum Status Traveller Status

National Identity Speaks Welsh

Home Language English

Country of Birth United Kingdom

Nationality	Passport Number	Passport Expiry date
United Kingdom		

Buttons: New, Open, Delete

Date of Assessment	Level
05/09/2016	E - Fluent

Buttons: New, Open, Delete

History

4. Select the pupil's **Ethnicity** from the drop-down list.
5. Select the pupil's **First Language** from the drop-down list.
6. Select the pupil's **Country of Birth**:
 - a. Click the **Browse** button to display the **Nation Browse** dialog.
 - b. Highlight the required country then click the **OK** button to return to the **Ethnic/Cultural** panel.
7. If the pupil's Nationality is not recorded:
 - a. Click the **New** button adjacent to the **Nationality and Passport Details** section to display the **Add Student Nationality** dialog.
 - b. In the **Nation Details** panel, click the **Browse** button to display the **Nation** browser.
 - c. Highlight the required nation then click the **OK** button to return to the **Add Student Nationality** dialog.
 - d. Enter **Passport Detail**, if known.
 - e. Enter **Tier4 Details**, if applicable to your school.
 - f. Click the **OK** button to the **Ethnic/Cultural** panel.
8. Ensure that the pupil's **Proficiency in English** record is up-to-date:
 - a. Click the **New** button adjacent to the **Proficiency in English** section. Alternatively, highlight an existing record then click the **Open** button to display the **Edit Proficiency in English** dialog.
 - b. Enter the required **Date of Assessment** or select the required date from the Calendar.
 - c. Select the **Level** from the drop-down list.
 - d. Click the **OK** button to the **Ethnic/Cultural** panel.

9. Click the **Save** button.

TIPS:

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

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

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



Checking Additional Information

Ensure that the following additional information is recorded in SIMS:

- **Youth Support Services Agreement (YSSA)** status (**applicable to Middle deemed Primary, All-Through schools, Special schools and Pupil Referral Units**)
The YSSA replaces Connexions. It applies to pupils between age 12 and 25 with special educational needs and pupils between age 12 and 20 with no special educational needs.
- **Learner Support Code**, e.g. Post 16 Bursary of Vulnerable Group Bursary Awarded, Discretionary Bursary Awarded, etc. for 16 to 19 year olds (**applicable to All-Through schools, Special schools and Pupil Referral Units**)
- **Service Children in Education** information.

The Bulk Update routine can be used to assign and edit these values for a specific selection of pupils at the same time, if required (please see *Updating Information Using the Bulk Update Routine* on page 26).

1. Select **Focus | Pupil | Pupil Details** to display the **Find Pupil** browser.
2. Search for then double-click the required pupil to display the **Pupil Details** page.
3. Click the **Additional Information** hyperlink to display the **Additional Information** panel.

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

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

NOTE: *YSSA replaced Connexions Assent.*

5. If the pupil is the child of a parent(s) in the armed forces, ensure that the correct value is selected from the **Service Children in Education** drop-down list.
6. Select how the school was notified about the **Service Children in Education** information by selecting from the **Source of Service Children in Education** drop-down list.
7. Ensure that the **Pupil Premium Indicator for year 2017/2018** check box is selected, if applicable. To enter a note related to the applicable year, click the **Search** button adjacent to the **Notes** field.

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

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

Updating an existing Learner Support record:

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



Checking Special Educational Needs Information

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

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

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

- **SEN Need Type**
 - **SEN Type Ranking**
 - **Provision Type** (not applicable to Pupil Referral Units or Special schools)
 - **Time in SEN Unit** - member of SEN Unit
 - **Resourced Provision**
1. Select **Focus | Pupil | Special Educational Needs** to display the **Find SEN Student** browser.
 2. Select the required **SEN Status** from the drop-down list. Additional search criteria can be selected, if required, e.g. **Year Group**.

3. Click the **Search** button to display a list of pupils who match the criteria.

Name	Year Group	Class	House	Gender	SEN Status
Abdulah, Tamwar	2	2JB		Male	K - SEN Support
Balinski, Iwa	1	ASH		Female	E - Education, Health and Care Plan
Chappling, Martin	5	5BB		Male	K - SEN Support
Dorota, Imber	3	3TO		Female	K - SEN Support
Haddon, Connor	3	3CB		Male	K - SEN Support
Jackson, Chloe	4	4SL		Female	K - SEN Support
Khan, Surjeeta	3	3TO		Female	K - SEN Support
Mastropiero, Elena	3	3CB		Female	K - SEN Support

4. Double-click the name of the required pupil to display the **Student SEN details** page.
5. Click the **Basic SEN Details** hyperlink to display the **Basic SEN Details** panel.

3 Basic SEN Details

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

[Status History]

Statement Pending? [Text Box]

Current Needs

Rank	Start Date	Need Type	Description
1	19/04/2016	Visual Impairment	Requires glasses for ...
2	05/02/2015	Speech, Language or Communication Need	As English is Tamwar...

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

Full Descriptions

Attachment	Summary	Type	Owner
[Icon]	IEP May 2015	SEN Document	Grosvenor Gillian

Additional Support:

Curriculum and Teaching Methods: Some targeted differentiation

Grouping and Support: Targeted and sustained additional support

Advice and Assessment: External advice/assessment

Specialised Resources: Individual access to normally available equipment

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

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

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

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

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

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

7. Ensure that the **Current Needs** information is up-to-date and correct.
 - a. To add a **Need Type**, click the **New** button (adjacent the **Current Needs** panel) to display the **Add SEN Need** dialog.

A temporary **Ranking** is calculated automatically.

- b. By default, today's date is displayed as the **Start Date** but this can be edited, if required.
- c. Select the **Need Type** from the drop-down list then enter a **Description** (optional).

- d. Click the **OK** button to return to the **Basic SEN Details** panel.
 - e. To rank the SEN Needs in the required order, highlight a record then click the **Move Up** or **Move Down** button, as required.
 - f. To edit the **SEN Need** or **Description**, highlight the record then click the **Open** button to display the **Edit SEN Need** dialog. Edit the details as required, then click the **OK** button to return to the **Basic SEN Details** panel.
8. Click the **Provisions** hyperlink to display the **Provisions** panel.

8 Provisions					New Open Delete
Provision Type	Start Date	End Date	Cost	Frequency	
Time in SEN Unit	08/09/2014			Twice per week	
Resourced Provision	04/09/2012			1 x daily for 1 ...	

9. Ensure that records with a **Provision Type** of **Time in Unit** or **Resourced Provision** are recorded correctly. To edit an existing record, highlight the required record and then click the **Open** button.

Alternatively, to create a new record, click the **New** button to display the **Add/Edit SEN Provision** dialog.

The screenshot shows the 'Add/Edit SEN Provision' dialog box. The 'Provision Type' dropdown menu is open, displaying a list of options. The 'People Involved' section contains a table with columns for 'Roles'. The 'Notes/Documents' section contains a table with columns for 'Attachment', 'Summary', 'Type', and 'Owner'. The dialog box has 'OK' and 'Cancel' buttons at the bottom right.

10. Ensure that the details are entered correctly, paying particular attention to the **Provision Type**.
11. Click the **OK** button to return to the **Provisions** panel.
12. Update the other information on the **Student SEN details** page, if required and then click the **Save** button.

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

 **Completed**

Preparing Exclusions Information

Not applicable to Nursery schools

Exclusions information is required for pupils who were subject to any exclusion with a start date during the period 17/04/2017 to 31/08/2017 inclusive. Exclusions should not be counted if the Head Teacher withdrew them, or if the pupil was re-instated by the Discipline Committee or an independent Appeal Panel.

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

- Exclusion **Type** (category, e.g. fixed period, lunchtime or permanent).
- Exclusion **Reason** (select one code to provide the main reason).
- Exclusion **Start Date**.
- Actual number of sessions (**Length**) - required for fixed period and lunchtime exclusions.
- SEN Provision (please see *Checking Special Educational Needs Information* on page 54).

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

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

Recording an Exclusion

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

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

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

Exclusion Details

Type: [Dropdown] Reason: [Dropdown]

Start Date: [Text] [Calendar] End Date: [Text] [Calendar]

Start Time: [Dropdown] End Time: [Dropdown]

Part Time Exclusion: ☐ Length School Days: [Text] [Calculate]

Comments: [Text Area]

Agency Involved: [Text]

Academic Year: [Text] Term: [Text]

Discipline Committee

Committee Date: [Text] [Calendar]

Committee Result: [Dropdown] Reinstatement Date: [Text] [Calendar]

Parents Representation: ☐

Appeal Details

Appeal Received: ☐

Appeal Date: [Text] [Calendar] Appeal Result: [Dropdown]

Result Date: [Text] [Calendar] Reinstatement Date: [Text] [Calendar]

Notes/Documents

Attachment	Summary	Type	Owner	Last Modified
[Empty Table]				

[New] [Open] [Delete]

[OK] [Cancel]

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

Exclusion Details

Type: Fixed Term Reason: Verbal abuse/threatening behavior

Start Date: 02/10/2017 [Calendar] End Date: 02/10/2017 [Calendar]

Start Time: AM End Time: PM

Part Time Exclusion: ☐ Length School Days: [Text] [Calculate]

Comments: Ongoing bullying against othe members of the class.

Agency Involved: [Text]

Academic Year: Academic Year 2017/2018 Term: Autumn Term

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

Academic Year	Term	Start Date	End Date	Length	Exclusion Type	Exclusion Reason
Academic Year 2017/2018	Autumn Term	02/10/2017	02/10/2017	1	Fixed Term	Verbal abuse/threatening behaviour a...

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

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



Preparing Termly Attendance Information

Termly attendance data (including attendance codes and the number of sessions missed) should be provided for non-boarder pupils and leavers aged four to 15 inclusive on 31/08/2017, who were on-roll for at least one session during the collection period from the start of the 2017 Autumn term to 31/12/2017.

The attendance data collected in this return includes:

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

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

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

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

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

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



Additional Resources:

Producing the School Census Spring 2018 Return handbook
Managing Pupil/Student Attendance handbook (SIMS Attendance users)
Monitoring Session and Lesson Attendance handbook (SIMS Lesson Monitor users)



Recording Universal Infant School Meals

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.

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 collects information about pupils who receive a Universal Infant School Meal (school dinner) on census day.

School dinners taken on the **Reference Date** (by default, census day) can be calculated from the information stored in Dinner Money. Dinner Money users should therefore ensure that school dinners taken are recorded correctly via **Focus | Attendance | Take Register** or **Focus | Dinner Money | Record Pupil Meals**.

- If default meal patterns have been entered (via **Focus | Dinner Money | Pupil Default Meal Patterns**), the Dinner Register is populated automatically with the default meals.
 For more information about setting up default meal patterns, please refer to the *Setting up and Maintaining Dinner Money* handbook.
- Where any 'pupil not present' attendance marks have been entered, the Dinner Register is populated automatically with an absent mark.
- Any special meals entered in advance are displayed and are not overwritten by the default meal pattern.

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. Therefore, when completing the School Census **School Dinner Taken** panel, the calculated numbers must be edited to reflect hot meals provided by the school only. Ensure that the pupils listed on the Reception, Year 1 and Year 2 attendance registers are accurate and that the registers are taken on census day morning (before completing the School Census **School Dinner Taken** panel).

Updating Class Types

Applicable to Primary schools only

Before starting the return, it is necessary to indicate which classes a pupil is a member of – either **Nursery** (if the pupil is currently in a LA designated Nursery Unit) or **Other** (any other class). This is only needed for newly added pupils where they have transferred from a LA designated Nursery Unit into an 'Other' class.

The values displayed on the **Update Class Type** page default to those of the previous return. Existing details should be checked and edited, if necessary, and the details of any new pupils added.

NOTE: If new pupils exist, the default class type is displayed as blank.

1. Select **Tools | Statutory Return Tools | Update Class Type** to display the **Update Class Type** page.

Name	Date of Birth	Gender	AdNo.	YTI	Reg	Nursery	Other
Abdullah, Tarmwar	12/01/2009	Male	001275	4	4ES		✓
Abhra, Abjit	20/11/2009	Male	001336	3	3TO	✓	
Abhra, Alisha	20/11/2009	Female	001337	3	3TO	✓	
Abhra, Shaquib	17/12/2013	Male	001582	N2	AM	✓	
Ackton, Charlotte	10/02/2014	Female	001590	N2	AM	✓	
Ackton, Stan	22/03/2010	Male	001339	3	3CB	✓	

2. To specify the class type for an individual pupil, click in the applicable cell of the **Nursery** or **Other** column to enter a tick. Clicking the cell again removes the tick.
3. If all or the majority of pupils need to be assigned the same class type, the following method can be used to quickly populate the **Nursery** and **Other** columns:
 - a. Right-click the **Other** column header then select **Check All**.

Name	Date of Birth	Gender	AdNo.	YTI	Reg	Nursery	Other
Abdullah, Tarmwar	12/01/2009	Male	001275	4	4ES		✓
Abhra, Abjit	20/11/2009	Male	001336	3	3TO		✓
Abhra, Alisha	20/11/2009	Female	001337	3	3TO		✓
Abhra, Shaquib	17/12/2013	Male	001582	N2	AM		✓
Ackton, Charlotte	10/02/2014	Female	001590	N2	AM		✓
Ackton, Stan	22/03/2010	Male	001339	3	3CB		✓

- b. In the **Pupils View** panel, select, for example, Year **N2** from the year taught in (**YTI**) drop-down list. Only Year **N2** pupils are displayed in the **Pupils** panel.

- c. Right-click the **Nursery** column header then select **Check All**.

Name	Date of Birth	Gender	AdNo.	YTI	Reg	Nursery	Other
Clark, Felicity	02/02/2015	Female	001642	N1	N1 AM	✓	
Hollins, Bridget	23/02/2015	Female	001646	N1	N1 AM	✓	
Sauzo, Amiaz	17/05/2015	Male	001647	N1	N1 AM	✓	
Sonin, Marku	21/06/2015	Male	001648	N1	N1 AM	✓	

- d. Repeat steps b and c for any additional Nursery classes.
- e. To check your selections, select **All** from the **YTI** drop-down list.

Name	Date of Birth	Gender	AdNo.	YTI	Reg	Nursery	Other
Ciprio, Alicia	24/05/2009	Female	001359	4	4ES		✓
Clapson, William	22/02/2010	Male	001409	3	3CB		✓
Clark, Felicity	02/02/2015	Female	001642	N1	N1 AM	✓	
Clarke, Anabel	14/11/2007	Female	001302	5	5BB		✓
Clarke, Emma	15/01/2011	Female	001489	2	2GH		✓
Clarke, Harriette	09/11/2012	Female	001525	R	ELM		✓
Clarke, Matthew	16/01/2009	Male	001360	4	4ES		✓
Clint, William	17/03/2013	Male	001605	R	OAK		✓
Clinton, Joseph	07/07/2013	Male	001591	N2	AM	✓	
Clover, Frederick	22/11/2008	Male	001218	5	5DT		✓

4. Click the **Save** button.

If a message is displayed advising that some pupils have not been assigned a class type, click the **Yes** button then ensure that a class type is allocated to every pupil before saving again.

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

Resetting All Class Types

To reset all class types (via the **Update Class Type** page), right-click the **Nursery** (or **Other**) column header, then select **Remove All** from the pop-up list. The **Nursery** (or **Other**) column is cleared of all ticks.

Re-enter the correct class types for all pupils as previously described.

Identifying which Pupils have no Class Type Specified

To ensure that all pupils are assigned to a class type (via the **Update Class Type** page), select **No Class Type** from the **Status** drop-down list in the **Pupils View** panel. Any pupils without a **Class Type** are displayed in the **Pupils** panel.

Specify a class types for these pupils, as previously described.



Completed

Updating Early Years Information

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

Information about the following items should be recorded while producing the return (via **Routines | Statutory Returns | School Census - Early Years** panel):

- **Early Years Pupil Premium Eligibility** - The Basis for early years pupil premium eligibility (EYPP) should be specified when completing the return.
- **2 Year Old Basis for Funding** - The basis of funding, i.e. **High level SEN** or **Disability** or **Looked After or Adopted From Care**, should be specified when completing the return.

Data for the following items can be recorded before the return (via **Tools | Statutory Return Tools | Update Early Years**):

- **Funded Hours** - Funded hours are the total number of free child care hours that a child receives.
- **Hours at Setting** - Hours at setting include funded hours plus any additional hours funded by other means.
- **Disability Access Fund** - The disability access fund is payable as a lump sum once a year and awarded to pupils who meet the required criteria.
- **30 Hour Code** - The 11 digit 30 hour code must be obtained from the Tax Office (HM Revenue & Customs) by parents who meet the extended funded hours criteria.
- **Extended Funded Hours** - Extended funded hours are the number of hours that are in addition to the initial 15 funded hours that a child can receive.

The early years data is collected for the week in which the census day falls with the exception of disability access fund, which is collected for pupils who are in receipt of the fund on census day.

1. Select **Tools | Statutory Return Tools | Update Early Years** to display the **Update Early Years** page.

Where available, the hours data is brought forward from the previous Autumn Census.

Update Early Years

Save Undo

Census Term: Spring 2018 **Update Hours**

Pupils View Age at 31/08/2017: All YTI: All Reg: All Status: All

Pupils
Disability Access Fund, 30 Hour Code and Extended Funded Hours are NOT collected in the census for pupils aged 2 at 31/12/2017

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, Shaquab	17/12/2013	001582	N2	AM	3	4					
Ackton, Charlotte	10/02/2014	001590	N2	AM	3	3					
Clark, Felicity	02/02/2015	001642	N1	N1 AM	2	2					
Clinton, Joseph	07/07/2013	001591	N2	AM	4	4					
Daniels, Bryn	20/11/2013	001592	N2	AM	3	4					
Delarve, Millicent	10/02/2014	001583	N2	PM	3	3					
Ellis, Paul	08/02/2014	001584	N2	PM	3	3					
Falmer, Michael	20/03/2013	001593	N2	AM	4	4					
Fitzroy, Roxanne	07/07/2015	001643	N1	N1 PM	2	2					
Flint, Bradley	22/12/2014	001644	N1	N1 PM	2	3					
Gavil, Christi	05/12/2013	001594	N2	PM	3	4					
Hari, Kiran	17/01/2014	001595	N2	PM	3	3					
Holden, Beatrice	12/07/2015	001645	N1	N1 PM	2	2					
Hollins, Bridget	23/02/2015	001646	N1	N1 AM	2	2					
Kaur, Amara	12/01/2014	001596	N2	PM	3	3					
Kender, Fearnie	14/06/2014	001597	N2	PM	3	3					
Lin, Jian	22/01/2014	001586	N2	PM	3	3					
Ludwika, Karina	12/12/2013	001598	N2	AM	3	4					
Ludwika, Lidia	12/12/2013	001599	N2	AM	3	4					

The **Update Hours** button is available to Primary schools only. It enables Hours at Setting, for pupils who are receiving free nursery care, to be updated automatically (provided that Early Years Attendance Patterns have been defined via **Focus | Pupil | Pupil Details**).

2. Click the **Update Hours** button to display the number of hours that the listed pupils are expected to attend during the census week (based on the early years provision times recorded as part of their attendance pattern).

NOTE: If your school does not use the Define Early Years Attendance Patterns functionality, the data can be entered in the grid manually.

3. To add or edit the number of **Hours at Setting**, **Funded Hours** or **Extended Funded Hours** for an individual pupil, select the required criteria from the options in the **Pupils View** panel. Highlight the required pupil record in the **Pupils** panel, 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.

4. If most of the pupils are receiving the same number of hours, the following method can be used to quickly populate the column:
 - a. In the **Pupils View** panel, select the required year group from the **YTI** (Year Taught In) drop-down list. Only the selected pupils are displayed in the **Pupils** panel.
 - b. Right-click in the **Pupils** panel then select **Select All** from the drop-down list.
 - c. Click in one of the highlighted cells of the column you wish to populate, i.e. **Hours at Setting**, **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 the remaining pupils.
 - d. Click to the right of the grid to deselect all.
 - e. Edit the entry for each pupil who is receiving a different number of hours. This is achieved by highlighting the required pupil, clicking in the associated **Hours at Setting**, **Funded Hours** or **Extended Funded Hours** cell, as applicable and then entering the required number.
5. 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.
6. Enter the 11 digit 30 Hour Code, e.g. 500000000000, in the applicable cell, if in receipt of extended funded hours.
7. Click the **Save** button.
The Early Years report is available from the **Detail Report** drop-down list via **Routines | Statutory Returns | School Census**.

☐ Completed

Using the Status to Determine if Hours at Setting or Funded Hours are Recorded

1. 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.
2. Enter the required values for these pupils as described previously.
3. Click the **Save** button.

Updating Pupils with Top-Up Funding

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

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

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

Update Students with Top-up Funding

Update

Term

Spring 2018

Students On-Roll on Census Day

Surname

Forename

YTI

All

Reg

All

Preferred Surname

SEN

<Any>

Ever in care at this school

<Any>

Search

Top-up Funding

Add

Remove

Surname	Preferred Surname	Forename	YTI	Reg	SEN	Ever in Care
▶ Aaron	Aaron	Chris	6	6KH		No
Davies	Davies	Ben	4	4ES		No
Dexter	Dexter	Bethany	3	3CB		No

04| Preparing Pupil Level Information

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

Term: Spring 2018 Students On-Roll on Census Day

Surname: Forename: YTI: All Reg: All

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

Surname	Preferred Surname	Forename	YTI	Reg	SEN	Ever in Care
White	White	Aurora	4	4SL		No
Whitehead	Whitehead	William	R	ELM		No
Whitemore	Whitemore	Amie	2	2JB		No

Top-up Funding Add Remove

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

Term: Spring 2018 Students On-Roll on Census Day

Surname: Forename: YTI: All Reg: All

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

Surname	Preferred Surname	Forename	YTI	Reg	SEN	Ever in Care
Whitehead	Whitehead	William	R	ELM		No

Top-up Funding Add Remove

Surname	Preferred Surname	Forename	YTI	Reg	SEN	Ever in Care
Aaron	Aaron	Chris	6	6KH		No
Davies	Davies	Ben	4	4ES		No
Dexter	Dexter	Bethany	3	3CB		No
White	White	Aurora	4	4SL		No
Whitemore	Whitemore	Amie	2	2JB		No

- To remove a pupil from the **Top-up Funding** list, highlight the required pupil then click the **Remove** button. The pupil's record is moved to the **Students On-Roll on Census Day** list, from where it can be reselected, if required.
- Click the **Update** button to save the data and arrange the list of pupils in **Surname** order.



Updating Pupils Post Looked After Arrangements

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

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

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

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

Update Students Post Looked After Arrangements

Update

Term: Spring 2018 Students On-Roll on Census Day

Surname: Forename: YTI: All

Preferred Surname: Reg: All Ever in Care at this school: <Any>

Post Looked After Arrangements

Surname	Preferred Surname	Forename	YTI	Reg	Ever in Care	Post Looked After Arrangements	Evidence Obtained
▶ Cain	Cain	William	R	ELM	Yes	Ceased to be looked after through Adoption	<input checked="" type="checkbox"/>
Franklin	Franklin	Ethan	2	2JB	Yes	Ceased to be looked after through a Special Guardianship...	<input type="checkbox"/>

04 | Preparing Pupil Level Information

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

Term: Spring 2018 Students On-Roll on Census Day

Surname: Forename: YTI: All

Preferred Surname: Reg: All Ever in Care at this school: <Any>

Surname	Preferred Surname	Forename	YTI	Reg	Ever in Care
Smith	Smith	Alex	6	6VC	No
Smith	Smith	Amy	6	6KH	No
Smith	Smith	Erin	1	PINE	No
Smith	Smith	Laura	6	6VC	No
Smyth	Smyth	Cheryl	3	3TO	No
Smyth	Smyth	Jonathan	3	3CB	No
Smyth	Smyth	Rhianna	3	3CB	No
Smythye	Smythye	Vincent	4	4SL	No

Post Looked After Arrangements

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

Post Looked After Arrangements

Surname	Preferred Surname	Forename	YTI	Reg	Ever in Care	Post Looked After Arrangements	Evidence Obtained
Cain	Cain	William	R	ELM	Yes	Ceased to be looked after through Adoption	<input checked="" type="checkbox"/>
Franklin	Franklin	Ethan	2	2JB	Yes	Ceased to be looked after through a Special Guardianship Order (SGO)	<input type="checkbox"/>
Smith	Smith	Amy	6	6KH	No	Ceased to be looked after through Adoption	<input type="checkbox"/>
Smyth	Smyth	Jonathan	3	3CB	No	Ceased to be looked after through a Special Guardianship Order (SGO) Ceased to be looked after through a Residence Order (RO) Ceased to be looked after through a Child Arrangement Order (CAO)	<input type="checkbox"/>

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

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

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

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

☐ **Completed**

05| What Next?

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

The SIMS 2017 Autumn Release (7.178) must be installed before completing the School Census Spring 2018 Return. However, it is advisable to check whether a later version of SIMS is available and then upgrade to the current release, if necessary, because it might include updates applicable to the forthcoming return.

You should now be ready to produce the final School Census Spring 2018 Return.

Where Can I Get More Information?

In addition to this preparation guide, the following resources are also available:

- *Producing the School Census Spring 2018 Return (English Primary/Middle deemed Primary Schools)* handbook - this handbook outlines the School Census process in SIMS for Primary and Middle deemed Primary schools.
- *Producing the School Census Spring 2018 Return (English Nursery Schools)* handbook - this handbook outlines the School Census process in SIMS for Nursery schools.
- *Producing the School Census Spring 2018 Return (English Special Schools)* handbook - this handbook outlines the School Census process in SIMS for Special schools.
- *Producing the School Census Spring 2018 Return (English All-Through Schools)* handbook - this handbook outlines the School Census process in SIMS for All-Through schools.
- *Producing the School Census Spring 2018 Return (English Pupil Referral Units)* handbook - this handbook outlines the School Census process in SIMS for Pupil Referral Units.
- *School Census Academic Year 2017/2018 Validation Errors and Resolutions* document - this guide provides suggestions on how to resolve any validation errors or queries.
- *Managing Pupil/Students* handbook - this handbook provides details about the processes that relate to the management of pupil data in SIMS.
- *Setting Up and Administering SIMS* handbook - this handbook provides information on how to set up the various areas of SIMS in readiness for day-to-day use, such as setting up lookups (drop-down lists), creating academic year/admission groups, setting up behaviour management defaults, etc. It also covers the more complex processes that are likely to be carried out by a School/System Administrator.

Guidance about data protection and how pupil data is shared is available from the GOV.UK website (<https://www.gov.uk/guidance/data-protection-how-we-collect-and-share-research-data>).

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

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

Documentation is also available from the School Business Services Blog (<https://www.schoolbusinessservices.co.uk/blog/>).

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