



Applicable to 7.180 onwards

Producing the School Census Summer 2018 Return

English Secondary/Middle
deemed Secondary Schools



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01 | Introduction

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Overview

This handbook provides the information needed by Secondary/Middle deemed Secondary schools in England to complete the School Census Summer 2018 Return, which takes place on Thursday 17 May 2018.

The School Census Summer 2018 Return is required to be completed by maintained Nursery schools, Primary schools, Middle schools, Secondary schools, All-Through schools, Special schools, Pupil Referral Units (PRUs), City Technology Colleges (CTCs) and Academies (including free schools) in England. Non-maintained Special schools are also required to submit the return.

Currently, there are three School Census returns each year (i.e. Autumn, Spring and Summer), which collect detailed information about school characteristics and student details, e.g. student address, free school meals, exclusions, etc. Different data is collected depending on which return is being prepared, and your school phase.

A list of items collected from Secondary/Middle deemed Secondary schools in England for the School Census Summer 2018 Return is available in a later section of this handbook (please see *Preparing Data for the School Census Return* on page 6).

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

How has the School Census Summer Return Changed?

Changes to the School Census Summer Return include the following:

- Census date 17/05/2018
- Attendance collected from 01/01/2018 to 01/04/2018
- Exclusions collected from 01/09/2017 to 31/12/2017
- Free School Meal Eligibility collected from 19/01/2018 to 17/05/2018
- Learner Support collected from 01/08/2017 to 17/05/2018.

Unique Reference Number

Routines | Statutory Returns | School Census

The school Unique Reference Number (**URN**) is now displayed in the **School Information** panel.

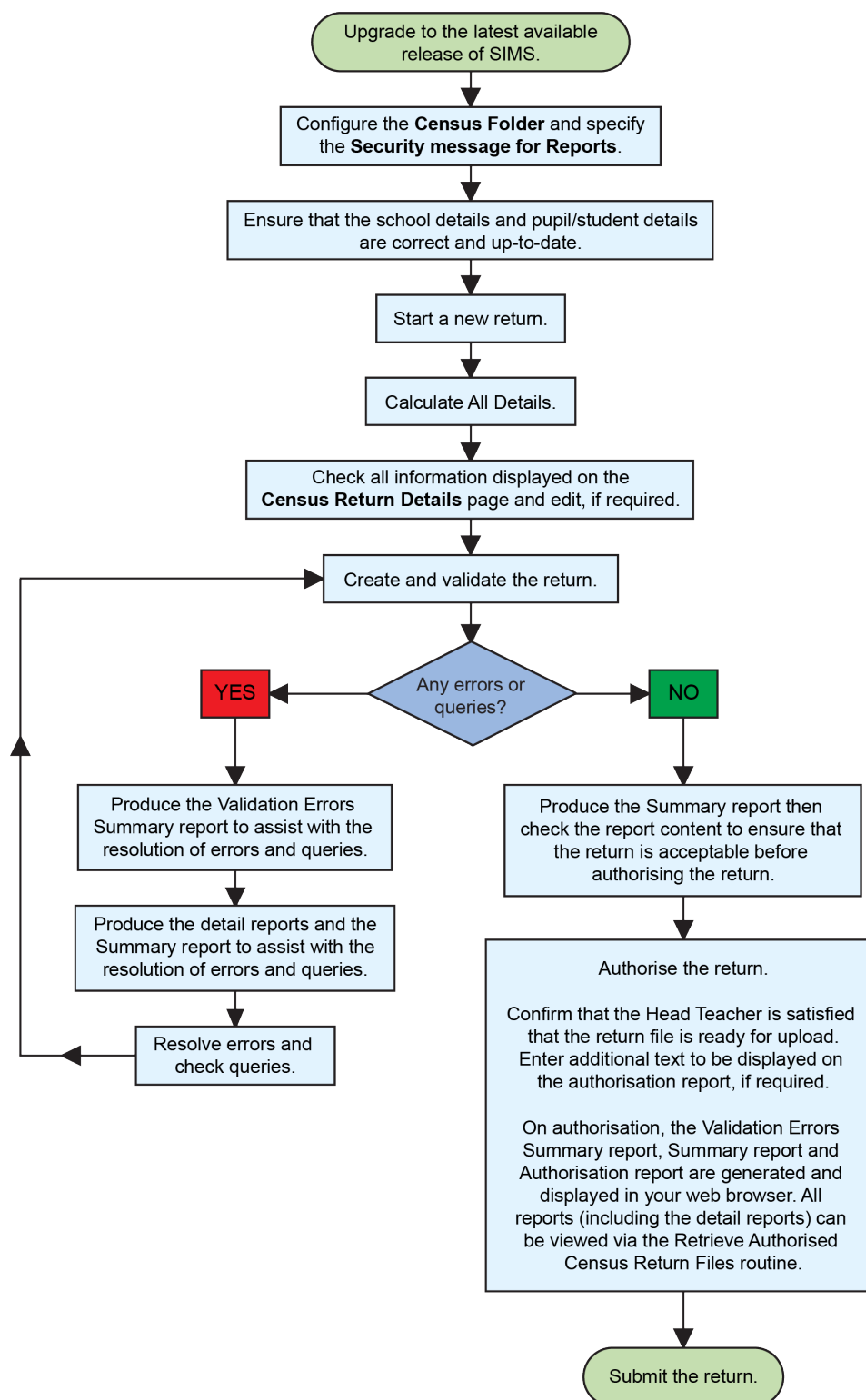


More Information:

Editing School Information on page 13

Steps to Producing the School Census Return

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



Where to Find More Information

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

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

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Setting Permissions

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

Producing the Return

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

Editing and Preparing Data

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

- Administration Assistant
- Admissions Officer
- School Administrator.

Importing Revised Files

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

What Version of SIMS is Required?

To run the return, you must have the SIMS 2018 Spring Release (7.180) 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 7.180 or later.



Preparing Data for the School Census Return

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

The following information is collected from Secondary/Middle deemed Secondary schools for the School Census Summer 2018 Return.

School Level

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

Student Level

- Student Identifiers:
 - unique pupil number (UPN) and former UPN, unique learner number (ULN)
 - surname, forename, middle names, former surname, preferred surname
 - date of birth and gender.
- Student Characteristics:
 - nationality, country of birth, language code
 - post looked after arrangements
 - free school meal eligibility start date, end date and UK country in which the eligibility applies
 - top-up funding indicator
 - Youth Support Services Agreement (YSSA) indicator and Learner Support code.
- Status: enrolment status, date of entry, date of leaving, part-time indicator, boarder indicator and actual national curriculum year group.
- Special Educational Needs: SEN Provision, member of SEN unit (sometimes called special class) indicator and member of resourced provision indicator.

- Termly Exclusion Information (01/09/2017 to 31/12/2017): exclusion category, reason for exclusion, SEN provision (formerly stage), exclusion start date and actual number of sessions excluded from.
- Home Information: Student's home address, including post code and unique property reference number (UPRN).
- Termly Attendance Information (01/01/2018 to 01/04/2018): Possible Sessions, sessions missed due to authorised absence, sessions missed due to unauthorised absence, attendance codes and number of sessions missed.
- For more information and step by step instructions on the preparations that need to be carried out before the census return is produced, please refer to the *Preparing for the School Census 2018 Return* guide. This, together with other useful School Census documentation, can be found on the School Business Services Blog (<https://www.schoolbusinessservices.co.uk/blog/>).

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Creating a New School Census Return

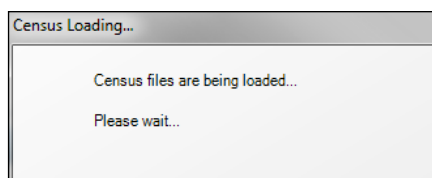
Before creating a new return, ensure that all student and school information is present and accurate in SIMS.

The School Census Summer 2018 Return collects data for:

- all students on the register on census day (17/05/2018).
- any additional students not on-roll on census day who:
 - had an exclusion that started between 01/09/2017 and 31/12/2017.
 - were on-roll for at least one session during the collection period from 01/01/2018 and 01/04/2018.
 - were awarded Learner Support funding from 01/08/2017 to 17/05/2018.

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

1. Select **Routines | Statutory Returns | School Census** to load the School Census validation and reporting files.



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

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

Census Return for Summer 2018 Term [Fileset ID: 900 (SIMS.net)]

New Search Open Delete Browse Next Previous Copy Help Close

Term Summer 2018 Census Folder C:\StatutoryReturnFolders\School Census

Security message for Reports
This report contains sensitive information.

Default Message

Description	File Name	Census Date	Date Created	Validated	Authorised Date
-------------	-----------	-------------	--------------	-----------	-----------------

By default, **Summer 2018** is displayed in the **Term** field.

*TIP: To view a previous term (in the current academic year), select from the **Term** drop-down list, then click the **Search** button.*

2. Ensure that the correct **Census Folder** is configured and that the required **Security message for Reports** is specified as described in the following sections.



More Information:

Deleting an Unauthorised Return on page 43

Specifying the Security Message for Reports on page 11

Configuring the Census Folder

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

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

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

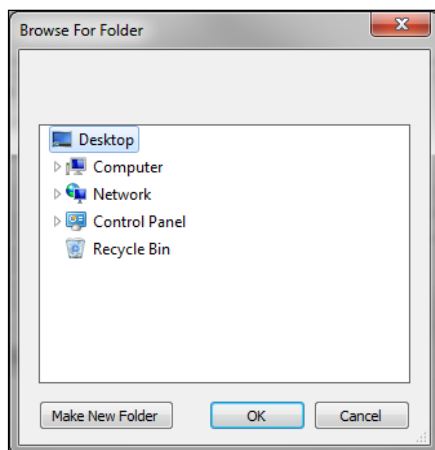
The General Data Protection Regulation (GDPR), which replaces the Data Protection Act 1998, is a directive for certain safeguards regarding the use of personal data. It is important that schools process all data (not just the data collected for the school census) in accordance with the full requirements of the GDPR.

Further information on the GDPR can be found on the Guide to the General Data protection Regulations (GDPR) page of the Information Commissioners Office (ICO) website (<https://ico.org.uk/for-organisations/guide-to-the-general-data-protection-regulation-gdpr>).

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

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

 *Browse button*



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

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

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

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

Specifying the Security Message for Reports

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

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

Editing Census Details

The **Census Details** panel displays the following read-only information:

- Census Date: 17/05/2018
- Attendance data collected from 01/01/2018 to 01/04/2018
- Exclusions data collected from 01/09/2017 to 31/12/2017
- FSM (Free School Meal) data collected from 19/01/2018 to 17/05/2018
- Learner Support data collected from 01/08/2017 to 17/05/2018.

1 Census Details		Calculate All Details	
Census Date	17/05/2018		
Description	School Census Summer 2018		
Attendance collected from	01/01/2018	Attendance collected to	01/04/2018
Exclusions collected from	01/09/2017	Exclusions collected to	31/12/2017
FSM collected from	19/01/2018	FSM collected to	17/05/2018
Learner Support collected from	01/08/2017	Learner Support collected to	17/05/2018

By default, the return **Description** is displayed as **School Census Summer 2018**.

1. Check the return **Description** and then edit, if required, e.g. to identify a dry run.

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

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

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

Calculating All Details

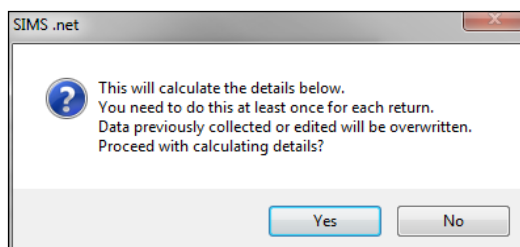
Clicking the **Calculate All Details** button extracts the required information from SIMS and displays the results in the applicable panels of the **Census Return Details** page.

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

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

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

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



2. Click the **Yes** button to calculate all details. At this point, depending on the number of students in the school, there may be a short delay while details are calculated.
The applicable panels on the **Census Return Details** page are populated with data.
3. The return can be saved at any point by clicking the **Save** button.

Editing School Information

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

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

2 School Information			
School Name	Green Abbey School		
LA	823	Establishment Number	4321
Telephone	851234	URN	
School E-mail Address	office@ga.org.uk		
School Phase	SS	Secondary	
School Type	Comprehensive all through 11-18		
Governance	Community	Intake Type	Comprehensive
Lowest NC Year	7	Highest NC Year	13
School Detail			

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

The screenshot shows the 'School Detail' dialog box for 'Green Abbey School'. The window title is 'SIMS School Detail'. The dialog has a menu bar with 'Save', 'Undo', and 'Help'. Below the menu bar are tabs for '1 Establishment', '2 Address', '3 Contact Details', '4 Sites', '5 Documents', and '6 Childcare'. The '1 Establishment' tab is active, showing a form with the following fields:

School Name	Green Abbey School	
LA	823 Central Bedfordshire	[Search] [X]
Establishment Number	4321	
Unique Reference Number	012345	
UK Provider Reference Number		
School Phase	Secondary	
School Type	Comprehensive all through 11-18	[Dropdown]
School Governance	Community	[Dropdown]
Intake Type	Comprehensive	[Dropdown]
Previous School Name		
Previous Estab Number		
Previous URN Number		
Boarding Pupils	<input type="checkbox"/> Nursery Class <input type="checkbox"/>	
Head Teacher	Mr Adrian Blacker	[Search] [X]
Main Contact	Mr Adrian Blacker	
Date Name Changed		[Date Picker]
Earliest DOA		[Date Picker]
Date Number Changed		[Date Picker]
Special Class or Unit	<input type="checkbox"/>	

At the bottom right of the dialog are 'OK' and 'Cancel' buttons.

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

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

3. Ensure that the establishment's six digit **Unique Reference Number** (URN) is entered. The number is available via the Get information about schools website (<https://get-information-schools.service.gov.uk/>), which is a register of schools and colleges in England.
4. Click the **Save** button then click the **OK** button to return to the **Census Return Details** page, where the updated details are displayed.

Information for Academies

2 School Information							
School Name	Green Abbey School		Previous Name	Previous Name School		Date Changed	31/07/2017
LA	823	Establishment Number	4321	Previous Estab Number	1234	Earliest DOA	17/07/2017
Telephone	851234	URN		Previous URN		Date Changed	
School E-mail Address	office@gg.org.uk						
School Phase	55	Secondary					
School Type	Academies						
Governance	Academies		Intake Type	Comprehensive			
Lowest NC Year	7	Highest NC Year	13				
<input type="button" value="School Detail"/>							

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.

Editing Students with Top-Up Funding

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

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

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

3 Top-up Funding						
Surname	Preferred Surname	Forename	YTI	Reg	SEN	Ever in
Abbes	Abbes	Graham	9	9A	E	No
Bristol	Bristol	Andrew	11	11C		Yes
Whiting	Whiting	Kellyann	11	11E		No

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

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

Update Students with Top-up Funding

Update

Term: Summer 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
▶ Abbens	Abbens	Graham	9	9A	E	No
Bristol	Bristol	Andrew	11	11C		Yes
Whiting	Whiting	Kellyann	11	11E		No

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

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

Term: Summer 2018 Students On-Roll on Census Day

Surname: Forename: YTI: 8 Reg: All

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

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

Top-up Funding Add Remove

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

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

Term: Summer 2018 Students On-Roll on Census Day

Surname: Forename: YTI: 8 Reg: All

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

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

Top-up Funding

Surname	Preferred Surname	Forename	YTI	Reg	SEN	Ever in Care
▶ Abbess	Abbess	Graham	9	9A	E	No
Bristol	Bristol	Andrew	11	11C		Yes
Whiting	Whiting	Kellyann	11	11E		No
Smith	Smith	Daniel	8	8C	E	No
Smith	Smith	Trinity	8	8E	K	Yes

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



Additional Resources:

Preparing for the School Census Summer 2018 Return handbook

Editing Student Post Looked After Arrangements

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

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

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

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

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

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

Update Students Post Looked After Arrangements

Update Links Help Close

Term: Summer 2018 Students On-Roll on Census Day

Surname: [] Forename: [] YTI: All

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

Post Looked After Arrangements Add Remove

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

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

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

Term: Summer 2018 Students On-Roll on Census Day

Surname: s Forename: d YTI: 13

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

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

Post Looked After Arrangements Add Remove

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

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

Post Looked After Arrangements Add Remove

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

5. For each student added to the **Post Looked After Arrangements** list, select the post looked after arrangement status by clicking in the applicable cell in the **Post Looked After Arrangements** column then selecting the required status from the drop-down list:

- **Ceased to be looked after through Adoption**
- **Ceased to be looked after through a Special Guardianship Order (SGO)**
- **Ceased to be looked after through a Residence Order (RO)**
- **Ceased to be looked after through a Child Arrangement Order (CAO).**

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

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

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

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

7. To remove a name from the list, highlight it then click the **Remove** button. The record is moved to the **Students On-Roll on Census Day** list, from where it can be reselected, if required.
8. Click the **Update** button to save the information and arrange the list of students in surname order.
If you have indicated that evidence has been obtained, you are reminded to ensure that the necessary documents are stored securely outside of SIMS or within the Document Management Server.
9. Click the **OK** button to continue.
10. Click the **OK** button (located at the bottom right-hand side of the screen) to return to the **Census Return Details** page, where the updated information is displayed in the **Post Looked After Arrangements** panel.



Additional Resources:

Preparing for the School Census Summer 2018 Return handbook



More Information:

Post Looked After Arrangements Report on page 33

Entering Attendance Information

Termly attendance data (including attendance codes and the number of sessions missed) should be provided for non-boarder students and leavers aged four to 15 inclusive on 31/08/2017, who were on-roll for at least one session during the collection period from 01/01/2018 to 01/04/2018.

Initially the **Attendance** panel is blank. However, after clicking the **Calculate All Details** button (located in the **School Information** panel) the display changes.

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

The information displayed in the **Attendance** panel (after the **Calculate All Details** button is clicked) is dependent on which of the following is applicable:

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

SIMS Attendance/Lesson Monitor Users

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

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

Are your Attendance Codes DfE Compliant?

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

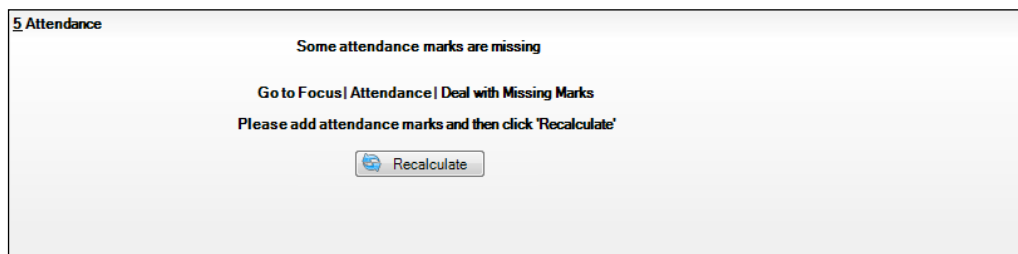
If all attendance marks have been entered in Attendance/Lesson Monitor, the following message is displayed in the **Attendance** panel, informing you that your attendance codes are DfE compliant but will be rechecked at the Create and Validate stage.

5 Attendance

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

03| Producing the School Census Summer Return

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



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

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

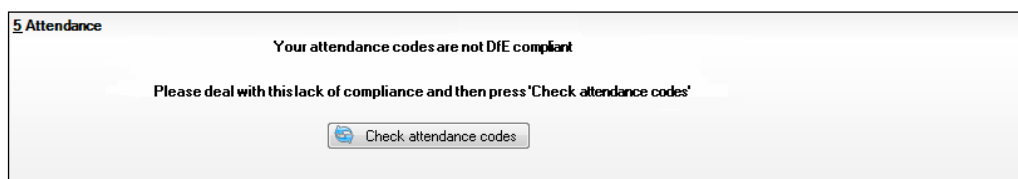


More Information:

Producing Detail Reports on page 30

Are your Attendance Codes DfE Non-Compliant?

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



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

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

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

SIMS Attendance/Lesson Monitor Not in Use

If Attendance/Lesson Monitor is not in use, the following data must be entered manually:

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

Attendance

Attendance Application not in use. Manual entry is required. Check for additional student & zero totals

Group By Attendance Collection Period (01/01/2018 - 01/04/2018)

Surname	Forename	Year Taught In	Reg Group	Enrol Status	T Poss Sessions	T Auth Absences	T Unauth Absences
Alexanders	Bertina			On Roll	0	0	0
Babe	Bud			On Roll	0	0	0
Bedeau	Sebastiana			On Roll	0	0	0
Benard	Junius			On Roll	0	0	0
Bourdage	June			On Roll	0	0	0
Calzone	Merlin			On Roll	0	0	0
Catapano	Charity			On Roll	0	0	0
Damrell	Glen			On Roll	0	0	0
Doberer	Hilbert			On Roll	0	0	0
Dusel	Ambrogio			On Roll	0	0	0
Frymark	Garrett			On Roll	0	0	0
Garcia	Sally			On Roll	0	0	0
Gasky	Silvano			On Roll	0	0	0
Gaumont	Allegria			On Roll	0	0	0

1. To filter the display of students in the **Attendance** panel, select **Year Group**, **Registration Group** or **Enrolment Status** from the **Group By** drop-down list.
Alternatively, select **Group by None** to display a list of all students.
2. To sort the displayed data by surname, forename, year group, registration group or enrolment status, click the appropriate column header.
3. For each student, enter the correct attendance numbers in the **T Poss Sessions**, **T Auth Absences** and **T Unauth Absences** columns.
4. To clear the attendance information and check for additional students, click the **Check for additional students & zero totals** button.

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

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Creating and Validating a School Census Return

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

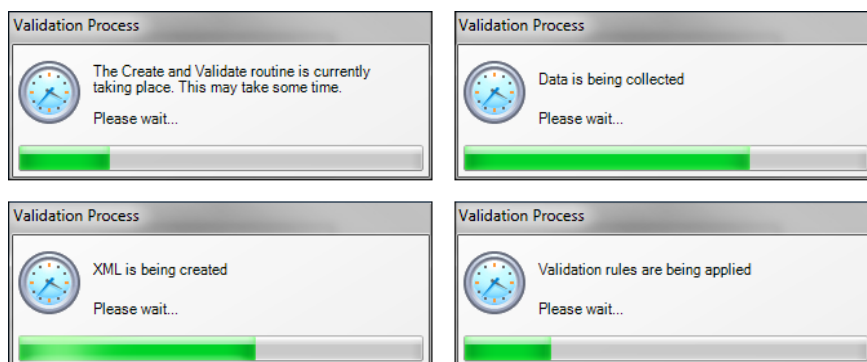
Validating the return creates an unauthorised return file, which is then run against a set of DfE rules. When the validation is complete, a list of errors and queries is displayed.

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

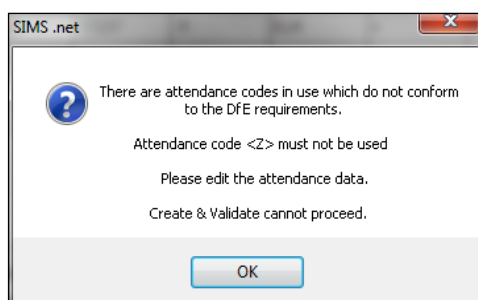
1. Select **Routines | Statutory Returns | School Census** to display the **Census Return** browser.
2. Click the **Search** button to display a list of returns.
3. Double-click the required return to display the **Census Return Details** page.
4. Click the **Create & Validate** button to start the process.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

04| Completing the School Census Summer Return

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

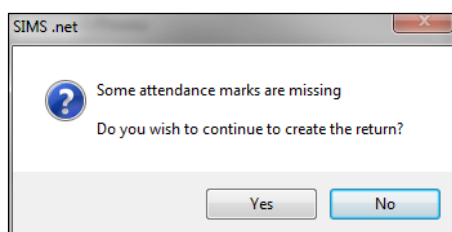


If any attendance codes are not DfE compliant, a dialog similar to the following graphic is displayed, informing you which code(s) must not be used.



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

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



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

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

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

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

Resolving Validation Errors and Checking Queries

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

Type	Sequence	Message	Location	Solution
F	1500	UPN missing.	Name: Abraham, Jane 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, Jack Date of Birth: 2010-05-07, Male UPN: KB23299914029	# Go to Focus Student Student Details Ethnic/Cultural panel and enter First language.
F	2350	Insufficient Address information provided.	Name: Bains, Kirki Date of Birth: 2005-01-18, Male UPN: HB20200109012	# 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: Sungal, Skaisel Date of Birth: 2003-03-28, Female, Age: 12 UPN: BB20200106088	# 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: VB23299914008	# Go to Focus Student Student details and check for duplicate pupil record.
Q	2355Q	Please check: Pupil record with no address details.	Name: Balinski, Cyla Date of Birth: 2010-03-14, Female UPN: CB23299914005	# 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: JB20200109032	# 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: MB20200109034	# 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.

04| Completing the School Census Summer Return

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, Rosel Date of Birth: 2009-03-07, Female/UPN	# Go to Focus Student Student Details and add or issue a UPN.
F	1340	Pupils aged 5 and over Language missing or invalid.	Name: Henderson, Jacki 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: Bains, Kirki Date of Birth: 2005-01-18, Male/UPN: H820200105912	# 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: Sunjgal, 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.

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

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

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

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, Rosel Date of Birth: 2009-03-07, Female/UPN	# Go to Focus Student Student Details and add or issue a UPN.
F	1340	Pupils aged 5 and over Language missing or invalid.	Name: Henderson, Jacki 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: Bains, Kirki Date of Birth: 2005-01-18, Male/UPN: H820200105912	# 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: Sunjgal, 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.

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

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.
Q	2520Q	Please check: sessions possible should not be greater than 150	Name: Abraham, Janel Date of Birth: 2005-05-19, Female/UPN	# Go to Focus Attendance (Lesson Monitor) Display Marks and check the attendance marks

- 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.

Type	Severity	Location	Solution
Q	1601Q	check: Pupil's age is out of range for school type.	Name: Sungal, Skarstel Date of Birth: 2003-03-28, Female, Age: 12 UPN: BE20200106088
Q	1620Q	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:
Q	1620Q	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: VS23299914008
Q	2355Q	check: Pupil record with no address details.	Name: Balinski, Cylal Date of Birth: 2010-03-14, Female UPN: CS23299914005
Q	2520Q	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: MS20200109034

- 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.

Type	Severity	Location	Solution
F	1500	ing	Name: Abraham, Jamal Date of Birth: 2008-05-19, Female UPN:
F	1500	ing	Name: Reid, Rosal Date of Birth: 2009-03-07, Female UPN:
F	1540	ed 5 and over Language missing or invalid.	Name: Henderson, Jacki Date of Birth: 2010-05-07, Male UPN: KS23299914029
F	2350	Address information provided.	Name: Barre, Kirki Date of Birth: 2005-01-18, Male UPN: H820200109012
Q	1601Q	check: Pupil's age is out of range for school type.	Name: Sungal, Skarstel Date of Birth: 2003-03-28, Female, Age: 12 UPN: BE20200106088
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:

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

- View a summary of validation failures, which is particularly useful if there are a large number of errors/queries, by clicking the **Report** button (located at the left-hand side and directly above the **Validation Errors Summary** panel). The report is displayed in your web browser, e.g. Internet Explorer®, where it can be printed or transferred to another application, if required (please see *Transferring Report Data to a Spreadsheet* on page 35).

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 | Student | Bulk Update**). For more information, please refer to the *Managing Pupil/Students* handbook.

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



More Information:

Transferring Report Data to a Spreadsheet on page 35

Producing Detail Reports

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

Each detail report header displays the **Security Message** that was defined in the **Census Return** browser, the **Report Criteria** and the **Total Students** who are listed in the report. Also included in the report header is the **School Name**, the **Fileset Number**, the **Filename**, the **Report Created** date, and the **XML Version**.

Where a student's National Curriculum Year group is different from what their date of birth would suggest, the applicable **YTI** cell is highlighted in yellow.

The following reports are currently available.

On-Roll Basic Details Report

Report Criteria: Students on-roll on census day.

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

*NOTE: Where a student is in a year group that is different to that expected (based on their date of birth), the applicable **Year Taught In** cell is highlighted in yellow.*

Leavers Basic Details Report

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

- Leavers with attendance 1 term ago (01/01/2018 to 01/04/2018)
- Leavers with exclusions 2 terms ago (01/09/2017 to 31/12/2017)
- Leavers with learner support of Vulnerable Group Bursary Awarded or Discretionary Bursary Awarded (01/08/2017 to 17/05/2018).

The Leavers Basic Details report provides the following information, where applicable: UPN, ULN, former UPN, legal surname, legal forename, middle names, former surname, date of birth (DOB), gender, date of admission (DOA), date of leaving (DOL), language, nationality, country of birth, part-time status, boarder indicator, attendance, exclusions and Learner Support.

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

Exclusions Report

Report Criteria: On-roll students and leavers with exclusions two terms ago (01/09/2017 to 31/12/2017). Not applicable to students who have exclusions with appeal result of **Reinstated** or **Not in the best interests of the child**.

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

Attendance Report

Report Criteria: Students with attendance one term ago (01/01/2018 to 01/04/2018). On-roll students and leavers (not boarders) aged four to 15 at 31/08/2017.

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

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

Absentees Report

Report Criteria: Students who have missed 14 sessions and whose absence might need to be tracked. On-roll students and leavers (not boarders) with attendance one term ago (01/01/2018 to 01/04/2018) who were aged four to 15 at 31/08/2017.

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

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

SEN Report

Report Criteria: On-roll student with SEN Provision/Status = **S** (Statement), **E** (Education Health and Care Plan), **K** (SEN Support).

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

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

Address Details Report

Report Criteria: Students on-roll on census day.

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

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

Free School Meal Eligibility Report

Report Criteria: On-roll students on census day who were eligible for free school meals on or after 19/01/2018 and up to and including census day.

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

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

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

Learner Support Report

Report Criteria: On-roll students and leavers aged 16 plus at 31/08/2017 who have been awarded Vulnerable Group and/or Discretionary Bursary funding from 01/08/2017 to 17/05/2018.

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

Top-up Funding Report

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

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

Post Looked After Arrangements Report

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

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

Generating Detail Reports

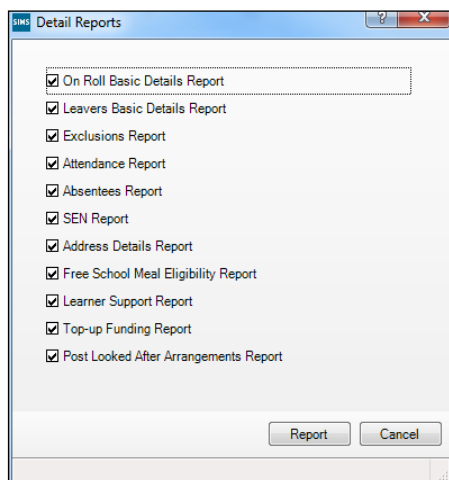
To select a single detail report, select the required report from the **Detail Report** drop-down list located at the top of the **Census Return Details** page. The selected report is generated automatically and displayed in your web browser, e.g. Internet Explorer®.

The screenshot shows the 'Census Return Details - Summer 2018 Term : School Census Summer 2018' web interface. The 'DetailReport' dropdown menu is open, showing the following options: On Roll Basic Details Report, Leavers Basic Details Report, Exclusions Report, Attendance Report, Absentees Report, SEN Report, Address Details Report, Free School Meal Eligibility Report, Learner Support Report, Top-up Funding Report, Post Looked After Arrangements Report, and Multiple Reports... (highlighted). The main form contains the following sections:

- 1 Census Details**
 - Census Date: 17/05/2018
 - Description: School Census Summer 2018
 - Attendance collected from: 01/01/2018
 - Exclusions collected from: 01/09/2017
 - FSM collected from: 19/01/2018
 - Learner Support collected from: 01/08/2017
- 2 School Information**
 - School Name: Green Abbey School
 - LA: 823
 - Establishment Number: 4321
 - Telephone: 851234
 - URN: [Empty]

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



By default, all detail reports are selected. If any reports are not required, deselect the associated check box. Click the **Report** button to generate the selected reports.

The report(s) are displayed in your web browser from where the data can be transferred to a spreadsheet, such as Microsoft® Excel, if required.

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

The report is saved with a filename that is made up of the following data fields separated by underscores ('_'): <LACode><SchoolNumber>_<SurveyType>_<LACode><LL><Year>_<SerialNumber>_<name of the report>_detail_report.html

For example:

8234321_SC2_823LL18_001_onroll_pupil_basic_details_report.html.

The following graphic shows an example of an On Roll Basic Details report:

School Census Summer - 2018 (On Roll Basic Data)																
Security Message : This report contains sensitive information.																
Report Criteria: Students on roll on Census day (17/05/2018)																
Total Students: 969																
School Name: Green Abbey School		Fileset Number: 900 (SIMS.net)														
Filename: 8234321_SC2_823LL18_001.LNA		Report Created: 03/01/2016														
XML Version: Validation 2016.1.1 - Released: 2016-04-07		ErrorList 2016.1.1 - Released: 2016-04-07														
														Summary 2016.1.1 - Released: 2016-04-07		
UPH	ULN	Legal Surname	Legal Forename	Preferred Surname	Former Surname	DOB	Gender	YTI	DOA	Enrolment Status	Language	Nationality	Country of Birth	YSSA	Part-time Status	Boarder
Y820200109033	5142335538	Aaron	Chris	Aaron	-	01/09/2005	Male	7	01/09/2017	Single Registration	English	United Kingdom	United Kingdom	Unsought	No	Not a Boarder
C823432117001	5142311344	Aaron	Jason	Aaron	-	08/03/2008	Male	7	01/09/2017	Single Registration	English	United Kingdom	United Kingdom	Unsought	No	Not a Boarder
J820200109032	5142335591	Aaron	Liz	Aaron	-	01/09/2005	Female	7	01/09/2017	Single Registration	English	United Kingdom	United Kingdom	Unsought	No	Not a Boarder
M820200109034	5142335593	Aaron	Sophie	Aaron	-	01/09/2005	Female	7	01/09/2017	Single Registration	English	United Kingdom	United Kingdom	Unsought	No	Not a Boarder
N823432113104	1111176838	Abbas	Graham	Abbas	-	20/09/2002	Male	10	03/09/2014	Single Registration	English	United Kingdom	United Kingdom	Obtained	No	Not a Boarder
M820200105001	1111175934	Acton	Stanley	Acton	Craig	18/12/2001	Male	11	01/09/2013	Single Registration	English	United Kingdom	United Kingdom	Obtained	No	Not a Boarder
J820200110003	5142335545	Acton	Stephen	Acton	-	12/03/2008	Male	7	01/09/2017	Single Registration	English	United Kingdom	United Kingdom	Unsought	No	Not a Boarder
J820200107001	1111176903	Acton	William	Acton	-	11/08/1998	Male	19	01/09/2011	Single Registration	English	United Kingdom	United Kingdom	Unsought	No	Not a Boarder
M820200109080	5142338830	Acton	Jordan	Acton	-	11/02/2004	Male	9	03/09/2015	Single Registration	English	United Kingdom	United Kingdom	Obtained	No	Not a Boarder
Y820200109080	1111188534	Acton	Stephanie	Acton	-	03/09/2003	Female	14	03/09/2012	Single Registration	English	United Kingdom	United Kingdom	Obtained	No	Not a Boarder



More Information:

Configuring the Census Folder on page 10

Transferring Report Data to a Spreadsheet on page 35

Printing a Report from your Web Browser

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

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

Transferring Report Data to a Spreadsheet

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

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

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

Deleting Temporary Web Browser Files

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

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

Deleting the cache in Internet Explorer 10

1. Open Internet Explorer 10, then select **Tools | Internet options** to display the **Internet Options** dialog.
2. Select the **General** tab.
3. In the **Browsing history** section, click the **Delete** button to display the **Delete Browsing History** dialog.
4. Ensure that the **Temporary Internet Files and website files** check box is selected then click the **Delete** button.
All temporary files (including any Statutory Returns reports files) that the browser has cached are deleted.
5. Click the **OK** button.

Deleting the cache in Internet Explorer 8 and 9

1. Open Internet Explorer 8 or 9, then click the **Tools** button located at the far right-hand side of the toolbar.
2. Select **Internet options** from the drop-down list to display the **Internet Options** dialog.
3. Select the **General** tab.
4. In the **Browsing history** section, click the **Delete** button to display the **Delete Browsing History** dialog.
5. Ensure that the **Temporary Internet Files** check box is selected then click the **Delete** button.

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

6. Click the **OK** button.

If a different web browser is in use, please refer to the help file applicable to that software package.

Producing the Summary Report

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

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

Generating the Summary Report

When the return is authorised, the Summary report is automatically generated and displayed in your web browser. However, the report can be run at any time after the return is created and validated.

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

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

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

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

For example: 8234321_SC2_823LL18_001_Summary_Report.html.

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



More Information:

- Configuring the Census Folder on page 10*
- Generating Detail Reports on page 33*
- Transferring Report Data to a Spreadsheet on page 35*
- Authorising the Return on page 38*
- Deleting an Unauthorised Return on page 43*

Editing an Unauthorised Return

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

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

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



More Information:

- Configuring the Census Folder on page 10*
- Specifying the Security Message for Reports on page 11*
- Resolving Validation Errors and Checking Queries on page 27*
- Producing Detail Reports on page 30*
- Producing the Summary Report on page 36*

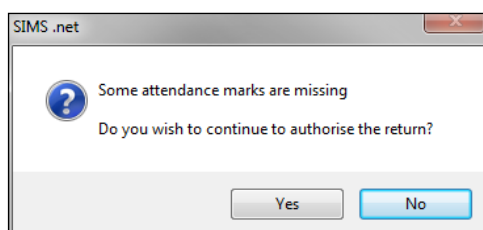
Authorising the Return

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

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

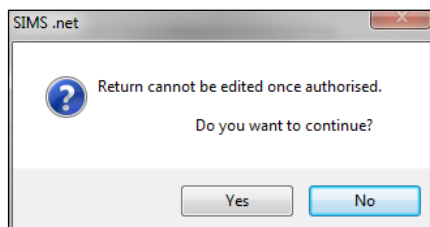
1. Click the **Authorise** button.

If missing marks exist, the following message is displayed.



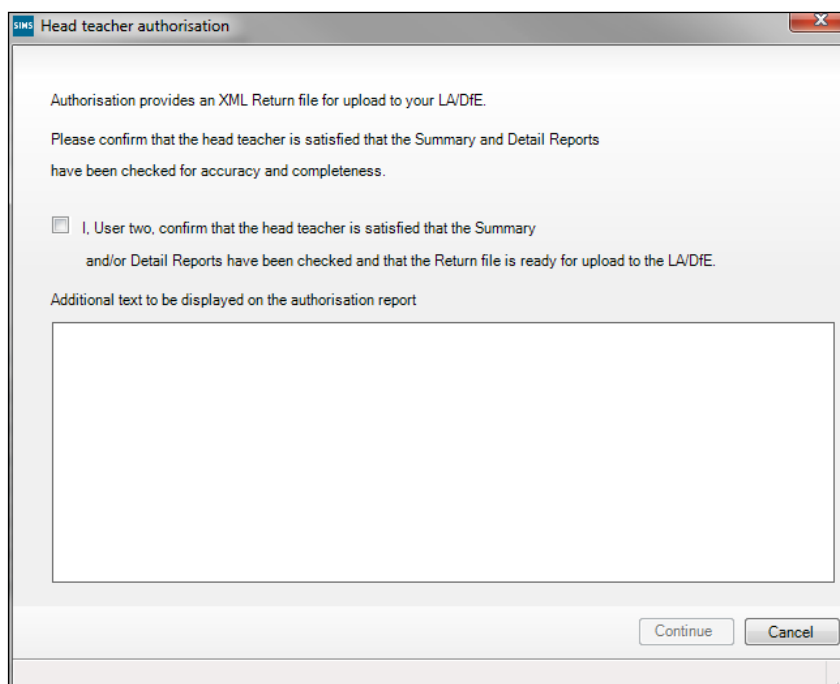
2. Click the **Yes** button to continue with the authorisation process or the **No** button if you want to return to SIMS where the missing marks can be entered.

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



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

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



4. Enter any additional text to be displayed on the authorisation report, if required. This may be requested by your LA, e.g. to explain the reason for any validation failures.
5. Select the confirmation check box to confirm that the Head Teacher is satisfied that the Summary and/or detail reports have been checked and that the return file is ready for upload to your LA/DfE.
When the confirmation check box is selected, the **Continue** button is activated enabling you to complete the authorisation process.
6. Click the **Continue** button to authorise the return.
 - The Summary report, Authorisation report and Validation Errors Summary report are generated automatically and displayed in your web browser, from where they can be printed, if required.
 - The return file extension changes automatically from UNA (unauthorised) to XML (authorised).
 - All details, i.e. the reports and the XML file, are saved in the **Census Folder**, which was specified previously in the **Census Return for <season> <year> Term** browser.

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

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

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

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

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



Additional Resources:

Designing and Running Reports handbook



More Information:

Producing the Summary Report on page 36

Retrieving Authorised Census Return Files on page 40

Copying a Return on page 42

Submitting the Return

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

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

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



More Information:

Configuring the Census Folder on page 10

Copying a Return on page 42

Retrieving Authorised Census Return Files

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

1. Select **Tools | Statutory Returns Tools | Retrieve Authorised Census Return Files** to display the **Retrieve Authorised Census Return Files for <census name>** page.
2. Select the type of census required from the **Return Type** drop-down list to display a list of previous returns that match the selected criteria.

3. By default, the files **Download to** the folder specified in the census browser. To specify a different folder:
 - a. Click the **Select a Folder** button (...) to display the **Browse For Folder** dialog. Navigate to the location of the required folder then highlight it. If a suitable folder does not exist, click the **Make New Folder** button then enter a suitable folder name.

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

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

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

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

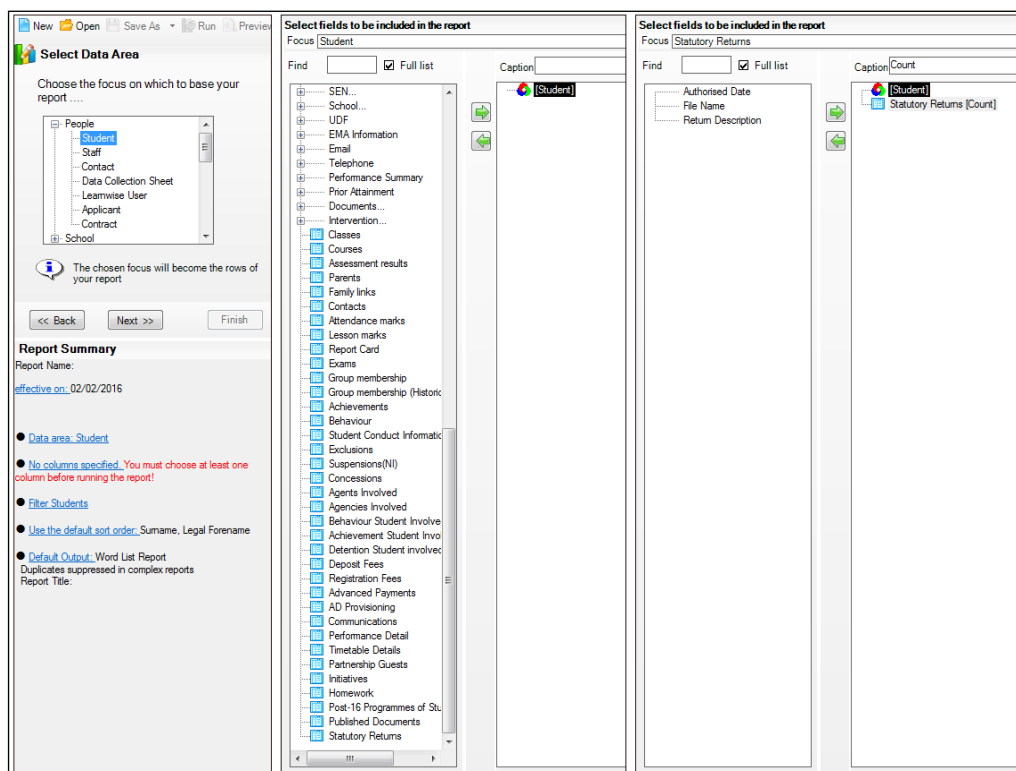
5. The contents of the specified folder can be viewed again by clicking the **Folder** button adjacent to the **Download to** field.

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

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

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



Additional Resources:

Designing and Running Reports handbook

Copying a Return

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

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

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

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

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

IMPORTANT NOTE: Any values for attendance (where applicable), Early Years, Post Looked After Arrangements and Top-up Funding will not be copied but will be populated from the current values held in the database. The Create & Validate routine must be run to generate a new census file.

4. Click the **Yes** button to make the copy, which is then displayed in the browser as:
Copy of <description of selected file>.
5. To rename the copied return, highlight it then click the **Open** button to display the **Return Details** page.
6. In the **Census Details** panel, edit the **Description** then click the **Save** button.

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

Deleting an Unauthorised Return

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

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

IMPORTANT NOTES: When a return file is deleted, any associated files, e.g. Validation Errors Summary, detail reports, etc. that have been produced are also deleted.
Any return files that have already been authorised cannot be deleted.

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

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

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