

For the academic year 2018/2019 Primary School End of Year Procedures

Detailed



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Overview

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

It is applicable to Primary school SIMS users. Secondary school users should refer to the *Secondary School End of Year Procedures*, available from the School Business Services Blog (http://www.schoolbusinessservices.co.uk/blog/)

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

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

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

Setting Permissions

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

Where to Find More Information

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

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

End of Year Procedure Check List

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

Complete	Description/Task
	Record changes to teaching staff in Personnel (please see <i>Recording Changes to Teaching Staff in Personnel</i> on page <i>3</i>).
	Create the new academic year (please see <i>Creating the New Academic Year</i> on page <i>16</i>).
	Set up the pastoral structure for the new academic year (please see Setting up the New Academic Year's Pastoral Structure on page 18).
	Add intake and admission groups (please see Adding Intake/Admission Groups on page 32).
	Import Admissions and Transfer Files (please see <i>Importing Admissions and Transfer Files (ATF)</i> on page 35).
	Import Common Transfer Files (please see <i>Importing Common Transfer Files (CTFs)</i> on page 35).
	Check dates for part-time pupil/students (please see <i>Checking Dates for Part-Time Pupil/Students</i> on page <i>37</i>).
	Record leavers (please see Recording Leavers on page 38).
	Export Common Transfer Files (please see <i>Exporting Common Transfer Files (CTFs)</i> on page 40).
	Set up the promotion mapping for the new academic year (please see Setting up the Promotion Mapping for the New Academic Year on page 43).

Complete	Description/Task
	Change the status of applications (please see <i>Changing the Status of Applications to Offered or Accepted</i> on page <i>50</i>).
	Allocate applicants to registration group/classes (please see Allocating Applicants to Registration Groups/Classes on page 55).
	Print class/registration group lists for the new academic year (please see <i>Printing Class (Registration Group) Lists for the New Academic Year</i> on page 58).
	Print OMR registration sheets for the first week of term (please see In SIMS Attendance - Printing OMR Registration Sheets for the First Week of Term on page 73).
	Enter reasons for absence last year (please see In SIMS Attendance - Entering Reasons for Absence Last Year on page 61).
	Map meal charges (please see <i>Meal Charges Mapping</i> on page 63).
	SIMS Learning Gateway (please see SIMS Learning Gateway on page 72).

Routines for After the New Academic Year has Started

Complete	Description/Task
	Admit applicants (please see Admitting Applicants on page 64).
	Re-admit pupil/students (please see <i>Re-Admitting Pupil/Students</i> on page 67).
	Print the official register for July (please see In SIMS Attendance - Printing the Official Register for July on page 68).
	Add 'Not Required' codes (please see In SIMS Attendance - Using the Part- Time Pupil/Students Routine to Add Not Required Codes on page 69).
	Run housekeeping routines (please see <i>Running Housekeeping Routines in SIMS</i> on page 71).

Recording Changes to Teaching Staff in Personnel

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

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

Adding New Teachers to Personnel

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

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

Add Employee			
Basic Details			
Surname	Davis	Forename	George
Gender	Male	■ Date of Birth	21/08/1969
			Continue 🧿

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

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

```
Calendar button
```

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

ave 🄄 Undo 📥 Pr	Blacker	е							
loyment Details									
Employment Details	•								
aching Staff	V			Teac	her Num	ber	60/55916		
acher Category	Qualified T	eacher		🚽 Quali	fied Tea	cher Status	Grad Teacher	r Program	(trained in El 👻
aff Code	AB			Emplo	oyee/Pay	roll No.			
nployment Dates	Employme	nt Start Lea	ving Date	Cont Servi	ce Start	LA Start	Previous Employ	er Next	New
	01/09/19	87		01/09/198	32	01/09/1985	Brookside Comm		🔁 Open
									💥 Delete
	•			111				•	
neck	Check		Clearance	Date	Clearar	nce Level			New
	DBS Chec		03/09/201	-		ced Clearance			📄 Open
	Health Ch List 99		12/12/200		Satisfa	ctory Cleared			💢 Delete
	Lat 33		03/00/200	L.	LSI 33	Cleared			
ontract	Status	Start Date	Post		Service	e Term	Scale P	nint	New 📄
	otatas	01/09/2000		eacher	Leader		27	2011	C Open
	_								X Delete
									Clone
vice Agreement	Start Date		End Date		Agre	ement Hours/V	Veek		New 📄
									🗇 Open
									💥 Delete

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

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

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

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

Completed

Creating the New Academic Year

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

IMPORTANT NOTES:

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

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

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

For example, if the academic year starts on 04/09/2018 then an end date of 03/09/2019 is automatically supplied.

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

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

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

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

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

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



2. Click the **Next** button to display the **Define the school working week** page.

Defining the School Working Week

Create Academic Year		? 💌
Define the school working wee Specify the school working the school is open.	sk week by selecting which days o	or half days
First day of the school week:	Monday -	
Day of the week	AM Session	PM Session
Monday	V	
Tuesday	V	
Wednesday		
Thursday		
Friday		
Saturday		
Sunday		
No errors detected. Press 'Next' to	o continue	
Preview	< Back	Next > Cancel

The **First day of the school week** drop-down list is read-only and displays the first day of your school week, as specified when your system was first set up.

 Define the days when the school will be open by selecting the check box(es) adjacent to each required day, including both AM and PM sessions, as required. AM Session and PM Session check boxes are selected by default for Monday through to Friday.

NOTE: Boarding schools should select all fourteen sessions to record weekend registration.

2. Click the **Next** button to display the **Define the terms and term holidays** for the academic year page.

Defining School Terms

When entering term dates, the start date should always be the date the term starts, even if pupil/students are not in school on those days.

	and term holidays for the start and end d	-	? () ()	x
chool Terms and Ho	lidays			142.70
School Term	Term Start Date	Term End Date	Term Holiday	
Autumn Term	04/09/2018	19/12/2018	Christmas Holiday	
Spring Term	03/01/2019	05/04/2019	Easter Holiday	
Summer Term	23/04/2019	24/07/2019	Summer Holiday	
o errors detected. P	ress 'Next' to continue			
Add Term	Remove			

1. Enter the dates for the Autumn, Spring and Summer terms by clicking in the applicable **Term Start Date** and **Term End Date** fields and entering the dates in dd/mm/yyyy format, or by selecting from the calendar.

NOTE: Schools that have more than three terms in their academic year need to add additional terms (please see Adding Additional School Terms on page 11).

Alternatively, click in the date cell until a down arrow appears then click the arrow to display a calendar, from which the required date can be selected.

Cr	eate Academic Year				? <mark>x</mark>
	Define the terms and Define the school te	term holidays for the	-		
s	chool Terms and Holiday	/5			
	School Term	Term Start Date	Term End Date	Term Holiday	
α	Autumn Term	04/09/2018	19/12/2018	Christmas Ho	liday 🚺
	Spring Term	03/01/2019		2018 ► pliday	V
	Summer Term	23/04/2019	26 27 28 29 30		lay
N	o errors detected. Press	'Next' to continue	17 18 19 20 21 24 25 26 27 28	8 9 15 16 22 23 29 30 5 6	l
	Add Term R	emove	Today C	lear	
	Preview		< Back	Next >	Cancel

NOTE: You can overtype the name of the term in the **School Term** column if a different name is required.

- 2. Each term has a default holiday displayed in the **Term Holiday** column. If required, select a different holiday from the drop-down list or manually enter a new holiday name.
- 3. Repeat this process for all the default terms displayed, selecting the applicable holiday for each term. Any errors are displayed in the lower section of the wizard and must be resolved before you can proceed.

	r nd term holidays for t ol terms start and end d		? •	×
chool Terms and Hol	idays			
School Term	Term Start Date	Term End Date	Term Holiday	
Autumn Term	04/09/2018	19/12/2018	Christmas Holiday	
Spring Term	03/01/2019	05/04/2019	Easter Holiday	
Summer Term	23/04/2019	24/07/2019	Summer Holiday	
o errors detected. Pr	ess 'Next' to continue			
Add Term	Remove			
Preview		< Back	Next > Canc	el

4. If you are happy with the default three school terms, click the **Next** button to display the **Define the half term holidays** page and proceed to *Defining Half Term Holidays*.

NOTE: If the **Next** button appears greyed out, move the cursor off the last **Term End Date** by pressing the **Tab** key.

Create /	Academic Year			? ×	New Academic Year Preview
C	he the half term h Define the half term nformation is optio	n holidays, start a	nd end date for every	holiday. This	□ ① Academic Year 2018/2019 □ ① Autumn Tem 04/09/2018-19/12/20 □ ① Autumn Tem 04/09/2018-19/12/20 □ ② Autumn Tem 04/09/2018-19/12/20 □ ② Spring Tem 03/01/2019-05/04/201 □ ② Spring Tem 03/01/2019-05/04/201 □ ③ Summer Tem 23/04/2019-22/04/2 □ ③ Summer Tem 23/04/2019-22/04/2
Cate	gory	Start Date	End Date	Description	🖗 Summer Holiday 25/07/2019-03/09.
Half-	Term	22/10/2018	26/10/2018	Autumn Half Term	
Half-	Term	18/02/2019	22/02/2019	Spring Half Term	
Half-	Term	27/05/2019	31/05/2019	Summer Half Term	
No erro	rs detected. Press	Next' to continu	e		
Add H	loliday R	emove			
Prev	iew 🗹]	< Back	Next > Cancel	4

From this point onwards, you can select the **Preview** check box in the wizard to display a preview panel on the right-hand side of the wizard. The preview panel updates based on the selections you make throughout the process. Deselect the **Preview** check box whenever you want to hide the preview panel.

Adding Additional School Terms

Some schools may wish to add additional terms, if for example your school has four or six terms in an academic year. The following example demonstrates the addition of an Autumn term.

NOTE: When adding terms, the start date should always be the date the term starts, even if pupil/students are not in school on that day.

1. From the **Define the terms and term holidays for the academic year** page of the wizard, click the **Add Term** button to display the **Term Details** dialog.

Term Details	×
School Term:	Autumn Term 👻
Term Start Date:	04/09/2018
Term End Date:	19/12/2018
Term Holiday:	Christmas Holiday 👻
	OK Cancel

- 2. Select the term name from the **School Term** drop-down list. If the required name does not exist, enter a name manually, e.g. Autumn Term.
- Enter the Term Start Date and Term End Date in dd/mm/yyyy format. Alternatively, click the Calendar buttons and select the required dates from the calendars.



Calendar button

- 4. Select the holiday that will follow the term from the **Term Holiday** dropdown list, e.g. **Christmas Holiday**. If the required name does not exist, enter the holiday name manually, e.g. **Christmas Holiday**.
- 5. Click the **OK** button to add the term.
- 6. Repeat for any other additional terms that may be required.
- 7. Click the **Next** button to display the **Define the half term holidays** page.

Defining Half Term Holidays

Holidays are created automatically for the dates in between the term dates entered. For example, if the Spring term ends on 05/04/2019 and the Summer term starts on the 23/04/2019, then it is assumed that the dates in between are holidays. In addition, you need to enter the dates for half-term holidays manually.

NOTE: You do not need to define half-term holidays if you have created a six term academic year, where the half-term dates fall between the terms.

Create Academic Year				? 💌
Define the half term I Define the half tern information is option	m holidays, start and	d end date for every h	oliday. This	
Category	Start Date	End Date	Description	
No errors detected. Pres	s 'Next' to continue.			
Add Holiday	Remove			
Preview		< Back	Next >	Cancel

1. From the **Define the half term holidays** page, click the **Add Holiday** button to display the **Half Term Holiday Details** dialog.

Half Term Holi Category	Half-Term 👻	
Start Date	22/10/2018	
End Date	26/10/2018	
Description	Autumn Half Term	
	OK Cancel	

- 2. Select **Half-Term** from the **Category** drop-down list.
- 3. Enter the **Start Date** and **End Date** for the half-term holiday in dd/mm/yyyy format. Alternatively, click the **Calendar** buttons and select the required dates from the calendars.
- 4. Enter a **Description** for the half-term holiday if required, such as **Autumn Half-Term**. This description appears in the School Diary.
- 5. Click the **OK** button to add the half-term holiday.
- 6. Repeat steps 1 to 5 for both the Spring and Summer half-term holidays.

Define the half Define the h information	alf term holidays, start a	ind end date for every	y holiday. This
Category	Start Date	End Date	Description
Half-Term	22/10/2018	26/10/2018	Autumn Half Term
Half-Term	18/02/2019	22/02/2019	Spring Half Term
Half-Term	27/05/2019	31/05/2019	Summer Half Term
lo errors detected	I. Press 'Next' to continu	e	
Add Holiday	Remove		
		< Back	Next > Cancel

7. Click the **Next** button to display the **Define teacher training days** page.

Defining Teacher Training Days

The **Define teacher training days** page is used to enter any training days where pupil/students will not be attending school. It is advisable to enter any known INSET days at this point. Alternatively, they can be added later via the School Diary (**Focus | School | School Diary**).

Create Academic	Year		? 🗙
Define teacher This informa the School D	tion is optional at this s	tage and can be defined later via	
Category	Date	Description	
No errors detected	. Press 'Next' to continu	Je	
Add	Remove		
Preview		< Back Next >	Cancel

1. From the **Define teacher training days** page, click the **Add** button to display the **New Teacher Training Day** dialog.

New Teacher Training Day				
Category	Staff Training Day 🔻			
Date	01/10/2018			
Description	Inset 1			
	OK Cancel			

- 2. Select **Staff Training Day** from the **Category** drop-down list. If the required category name does not exist, enter the name manually.
- 3. Enter the **Date** of the training day in dd/mm/yyyy format or click the **Calendar** button and select the date.
- 4. Enter a relevant **Description** if required, e.g. INSET 1, to ensure that the type of training can be identified. The description appears in the School Diary.

5. Click the **OK** button to add the teacher training day. Repeat for any other required teacher training days.

Cre	eate Academic Year			? ×
	Define teacher training This information is o the School Diary.		and can be defined later via	
	Category	Date	Description	
,	Staff Training Day	01/10/2018	Inset 1	
N	o errors detected. Press	'Next' to continue		
		emove		
_				

6. Click the **Next** button to display the **Define public holidays** page.

Defining Public Holidays

In addition to other dates during term time, you will also need to specify any public holidays, such as Bank Holidays, that occur during term time.

Create Academic Ye	ar		? 💌
Define public holid This informatio the School Diar	n is optional at this	s stage and can be defined later via	
Category	Date	Description	
No errors detected. P	ress 'Next' to conti	inue	
Add holiday	Remove		
Preview		< Back Next :	Cancel

1. From the **Define public holidays** page, click the **Add holiday** button to display the **New Public Holiday** dialog.

New Public Holiday		
Category	Bank Holiday 🔹	
Date	19/04/2019	
Description	Good Friday	
	OK Cancel	

- 2. Select **Bank Holiday** from the **Category** drop-down list. If the category name does not exist, enter the name manually.
- 3. Enter the **Date** of the public holiday in dd/mm/yyyy format or click the **Calendar** button and select the required date.
- 4. Enter a relevant **Description**, such as Good Friday. This description appears in the School Diary.
- 5. Click the **OK** button to add the public holiday. Repeat this process for all public holidays throughout the academic year.

	Define public holida This information the School Diary	s optional at this s	tage and can be defined later vi	
	Category	Date	Description	
8.	Bank Holiday	19/04/2019	Good Friday	
	Bank Holiday	22/04/2019	Easter Monday	
	Bank Holiday	06/05/2019	May Day	
N	o errors detected. Pre	ess 'Next' to continu	ie	
	Add holiday	Remove		

6. Click the **Next** button to display the **Ready to create new academic year** page.

Creating the New Academic Year

Whilst it is not essential, it is strongly recommended that all other users log out of SIMS before commencing this process. This is because a large amount of processing resource is required to create an academic year. Please be aware that this process may take a long time because the system creates attendance records for the new year.

Ready to create new academic year Check the new academic year dates below and press create when you are ready. This process will take some time to complete and should not be aborted once started.	
→ Academic Year 2018/2019	
<pre></pre>	Cancel

1. A summary of the data entered is displayed on the **Ready to create new academic year** page. The detail for each term can be expanded to display its public holidays, teacher training days, etc. by clicking the applicable + icon. You are strongly advised to check this information carefully for any errors or inaccuracies.

Once you are sure that the information is correct, click the **Create** button to create the new academic year. If there are any anomalies in your settings, you are asked to confirm whether you wish to proceed or review your settings. If you are certain the data is correct, you can proceed.

The following warning message is displayed:

Create Aca	ademic Year 🛛 🕅
<u> </u>	This process will take some time to complete and should not be aborted once started. Do you wish to continue?
	Yes No

Progress is displayed via a progress indicator at the bottom of the wizard.



01| Setting Up the New Academic Year

Once complete, the final page of the wizard is displayed:



- 2. Click the **Close** button to close the wizard and complete the process.
- 3. It is recommended that once you have created an academic year, you validate group memberships by selecting **Tools | Validate Memberships**, which displays the following page.

Validate N	/emberships
	Your group memberships are currently being checked and group membership rules enforced . This is to support the annual promotion process. Please wait

Completed

Setting up the New Academic Year's Pastoral Structure

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

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

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

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

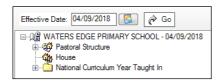
If you want teachers to be promoted with their pupil/students in the next academic year, this can be achieved as part of the pastoral promotion process (please see Setting up the Promotion Mapping for the New Academic Year on page 43).

If an additional year group is required, e.g. a Nursery has been introduced to the school, this should be added before admission groups are created to ensure that the new year group is available for selection (please see Adding Intake/Admission Groups on page 32).

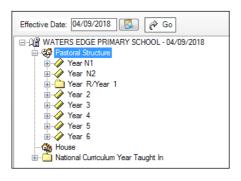
Opening the Structure of the New Academic Year

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

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



2. The **Effective Date** defaults to the start date of the next academic year. Whilst it is possible to change this date to view information, the default date must be used in order to edit information.



IMPORTANT NOTE: If you change the **Effective Date**, you must click the **Go** button to refresh the display.

3. The full structure can be viewed by clicking the + or - icons to expand or contract the display.

Checking National Curriculum Years

Please ensure that the National Curriculum year associated with each year group is correct. This can be achieved by right-clicking each year group and selecting **Properties** from the pop-up menu to display the **Year Group** dialog. The **National Curriculum Year** associated with the year group is displayed.

Year Group		
Year Group National Curriculum Year	Curriculum Year 3	
Short Name:	3	
Full Name:	Year 3	
Head of Year		
Supervisors:	Role Name	
	1	Ok Cancel

Completed

Adding New Year Groups

If an additional year group is required, e.g. a Nursery has been introduced to the school, this should be added before admission groups are created to ensure that the new year group is available for selection.

NOTE: Schools that have a Nursery and admit pupil/students into the Nursery later on in the academic year, e.g. in January, may benefit from creating either an N1 or N2 year at this point. This enables pupil/students to be assigned to the appropriate National Curriculum year when they join the school. This ensures the accuracy of a School Census return.

This process is unlikely to be required. If you do not intend to add any new year groups, please proceed to *Adding Classes (Registration Groups)*.

1. Select next year's pastoral structure (please see *Opening the Structure of the New Academic Year* on page *19*).

NOTE: If you are adding a year group because you are extending the range of years, you will also need to set up a National Curriculum year. This is achieved by right-clicking the **Pastoral Structure** item in the navigation tree, selecting **Setup Curriculum Years** then selecting the required curriculum year check box.

Effective Date: 04/09/2018 🔂 🎓 Go
WATERS EDGE PRIMARY SCHOOL - 04/09/2018 Pastoral Structure Pastoral Structure Pastoral Structure Pastoral Structure Pear N1 Pear N2 Pear Year N2 Pear Year 2 Pear Year 3 Pear Year 4 Pear 5 Pear 6 Pear 7 Pear 7 Pear 8 Pear 9 Pear 9

Errors are displayed at the bottom of the screen until years and classes have been added (as shown in the following graphic).

Error National Curriculum Year "Curriculum Year N1" does not have any Year Group attached

NOTE: Once a National Curriculum year has been created, it cannot be deleted. Therefore, please ensure that the correct NC year is added.

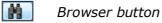
2. Right-click the **Pastoral Structure** item in the structure and select **New Year Group** from the pop-up menu to display the **Year Group** dialog.

		? 🔀
Curriculum	Year N2	•
N2		
N2		
Role	Name	
1		Ok Cancel
	N2 N2	N2

- 3. Select the **National Curriculum Year** with which the year group will be associated, from the drop-down list.
- 4. Enter a **Short Name** and a **Full Name** for the year group.

The **Full Name** (up to 32 characters) is used throughout SIMS to identify the year group (e.g. **Year 2**). The **Short Name** (up to 10 characters) is used for column headings in reports (e.g. **Y2**). Consequently, to ensure column headings fit comfortably on the report page, it is recommended that short names should be as short as possible, e.g. a maximum of six characters. Both names must be unique within the school.

5. Select the Head of Year if required, by clicking the Browser button to display the Select person dialog. This is optional (as many Primary schools do not have Heads of Year) and/or can be done at a later date if preferred. If you do not intend to add a Head of Year, please proceed to step 8.



6. Enter a **Surname** and/or **Forename** then click the **Search** button. Alternatively, leave the fields blank to search for all staff.

Sims Select person	? 🔀
🍿 People Browse	
🗌 Search 🚘 Print	
Surname Forename Role	<any suitable=""> 👻</any>
Name	
Avery, Mrs Helen	=
Bates, Miss Belinda	-
Boston, Mrs Sarah	
Boswell, Mrs Jennifer	
Brooks, Mr Carl	
Brown, Mrs Charmaine	
Brown, Mrs Pauline	
Brown, Mrs Susan	
Cable, Mrs Freda	
Chard, Mrs Vicky	-
	OK Cancel
Records found: 37	

Highlight the required person and click the **OK** button to select them as the Head of Year and return to the **Year Group** dialog.

 Select a Supervisor for the year group (if required) by clicking the New button to display the Supervisor Properties dialog. This is optional and/or can be done at a later date if preferred. If you do not intend to add a Supervisor, please proceed to step 8.

Νε	ew button	
Supervisor Propertie	s	? 🔀
Supervisor Properti Role:	ies Person:	
Supervisor	Mrs Pauline Brown	Q
		Ok Cancel

 Select the **Role** from the drop-down list then click the **Browser** button adjacent to display the **Select person** dialog. *NOTE: By default, the Role drop-down list displays Supervisor and Pastoral Manager.*

- Search for, and select, the required supervisor in the same way as the Head of Year. Click the Ok button on the Supervisor Properties dialog to set the selected person as the supervisor and return to the Year Group dialog.
- 8. Click the **Ok** button on the **Year Group** dialog to add the year group. You must now add applicable classes, as described in the next section.

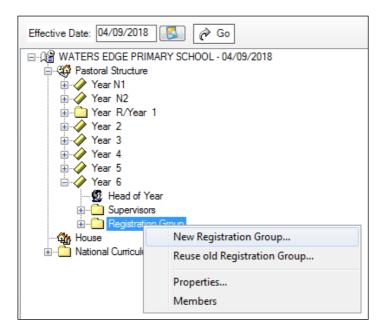
Completed

Adding Classes (Registration Groups)

You are strongly advised to check whether the name you intend to use for a new class has not previously been used. This is achieved by expanding the Pastoral Structure and appropriate year group then right-clicking the **Registration Group** folder and selecting **Reuse Old Registration Groups** from the pop-up menu to display the **Reuse old Registration Group** dialog. This dialog lists any classes that have previously been deleted.

If the required name is listed, highlight it and click the **OK** button to re-use the class rather than create a new class with the same name. If the required name is not listed, click the **Cancel** button then create a new class as follows.

- 1. Select next year's pastoral structure (please see *Opening the Structure of the New Academic Year* on page *19*).
- 2. Expand the year group to which you wish to add the class by clicking the adjacent + icon.



3. Right-click the **Registration Group** folder and select **New Registration Group** from the pop-up menu to display the **Class** dialog.

Class			? 💌
Class			
Short Name:	Rowan		
Full Name:	Rowan		
Registration Tutor	Mrs Pauline	Brown	M 💥
Supervisors:	Role	Name	
Room:			Q
			Ok Cancel

4. Enter a **Short Name** and **Full Name** for the new class.

The **Full Name** (up to 32 characters) is used throughout SIMS to identify the class, e.g. Rowan. The **Short Name** (up to 10 characters) is used for column headings in reports. Consequently, to ensure column headings fit comfortably on the report page, it is recommended that short names should be as short as possible, e.g. a maximum of six characters. Both names must be unique within the school.

5. Add the **Registration Tutor** by clicking the **Browser** button to display the **Select person** dialog.

Select person	?	×
🍿 People Browse		
🛉 Search 📥 Print		
Surname Forename Ro	Cole r	•
Name		-
Avery, Mrs Helen		Ξ
Bates, Miss Belinda		-
Boston, Mrs Sarah		
Boswell, Mrs Jennifer		
Brooks, Mr Carl		
Brown, Mrs Charmaine		
Brown, Mrs Pauline		
Brown, Mrs Susan		
Cable, Mrs Freda		
Chard, Mrs Vicky		-
	OK Cance	
Records found: 37		

- 6. Enter a **Surname** and/or **Forename** then click on the **Search** button. Alternatively, leave the fields blank to search for all staff.
- 7. Highlight the required person and click the **OK** button to select them as the Registration Tutor and return to the **Class** dialog.

8. Select a **Supervisor** for the class (if required) by clicking the **New** button to display the **Supervisor Properties** dialog. This is optional and can be done at a later date if preferred. If you do not intend to add a Supervisor, please proceed to step 9.

r Properties	1		
	Person:		
• •	Mrs Pauline Brown		<u> </u>
		Ok	Can

New button

 Select the Role from the drop-down list then click the Browser button adjacent to the Person field to open the Select Person browser. Select the required person in the same way as for the Registration Tutor.

NOTE: By default, the Role drop-down list displays Supervisor, Pastoral Manager or Joint Main Supervisor.

- Click the **Ok** button on the **Supervisor Properties** dialog to select the person as the Supervisor for the class return to the **Class** dialog.
- 9. Select the **Room** that will be used by this class (if required) by clicking the **Browser** button to display the **Room Browser** dialog.

sins Room I	Browser			
懒 Sear	ch Rooms			
M Search	📂 Open 💥 Delete		🔄 Links 🔻 😨 Help	💥 Close
Short Nan	ne	Long Name		Locati
Short Nam	e Long Name		Establishment	*
11	11		WATERS EDGE PRIMARY SCHOOL	
12	12		WATERS EDGE PRIMARY SCHOOL	E
13	13		WATERS EDGE PRIMARY SCHOOL	
J1	J1		WATERS EDGE PRIMARY SCHOOL	
J2	J2		WATERS EDGE PRIMARY SCHOOL	
J3	J3		WATERS EDGE PRIMARY SCHOOL	-
•				4
			ОК	Cancel
Record	ds found: 11			

- Enter either the Short Name or the Long Name of the room then click the Search button. Alternatively, leave all of the fields blank to search for all rooms.
- Highlight the required room then click the OK button to return to the Class dialog.

10. Click the **OK** button to create the class.



Additional Resources:

Adding Rooms tutorial in the SIMS Documentation Centre

Adding/Editing Rooms chapter in the Setting Up and Administering SIMS handbook



Important Note on Editing Class Names

There may be occasions when you wish to rename classes in either the current or next year's pastoral structure. This is sometimes required by schools that name their classes based on teacher's initials and the teacher then leaves the school.

It is <u>essential</u> that you do not just rename the class. This is because the class name is recorded in the class history. If you change the name, the change is made throughout the history of that class, so the class is recorded as <u>always</u> having been named according to the name change.

NOTE: To ensure that you do not rename a class to a name that already exists, right-click the required **Registration Group** folder in the pastoral structure and select **Reuse Old Registration Groups**. Any classes that have previously been deleted are displayed. If the required name is listed, highlight it then click the **OK** button to re-use it rather than create a new class with the same name. If the required name is not listed, create a new class.

Please see the following two examples:

Example 1:

A class is currently called **4AB** after a teacher named Anita Brown. At the end of the current academic year, Anita will move up with her class, which becomes **5AB**.

If you rename **4AB** to **5AB** then all the pupil/students in **4AB** will be recorded as always having been in **5AB** because the history is also amended.

In this circumstance, all you need to do is to create a new class called **5AB** in the pastoral structure for the new academic year (e.g. 2018/2019) and set the promotion mapping to promote to this class at the start of the new academic year. All pupil/students in **4AB** will move up to **5AB** at the start of the new academic year (please see *Setting up the Promotion Mapping for the New Academic Year* on page *43*).

Example 2:

A class is currently called **4SL** after a teacher named Sonia Lovell. Sonia is leaving and will be replaced by Andrew White during the same academic year.

If you rename **4SL** to **4AW** then all the pupil/students in **4SL** will be recorded as always having been in **4AW** because the history is also amended.

To correctly change a class name:

- 1. Add a new class (please see *Adding Classes (Registration Groups)* on page 23) in the current pastoral structure (e.g. 2018/2019) labelled with the new class name (e.g. **4AW**).
- 2. Delete the old class by right-clicking the required class name and selecting **Remove** from the pop-up menu to display the **Remove Registration Group** dialog.

Remove Registration	roup 🔋 💌
Remove Registration	Group
reallocate members	removed when it has no members. You can to other groups manually or you can specify default ing members will be moved.
Destination Group:	•
	Ok Cancel

- 3. Select the newly created class (e.g. **4AW**) from the **Destination Group** drop-down list. All members from the old class will be transferred to the new class.
- 4. Click the **Ok** button to delete the class and transfer the pupil/student memberships.
- 5. Click the **Save** button to save the changes.

General Advice

The responsibility for defining the naming convention of classes lies with the school. However, you should note that if you use teacher initials, you must carry out the previous instructions each time a teacher leaves or if there are any teaching changes that result in a class name change, e.g. teachers change class or years mid-year. In addition, you will need to create new classes based on the teacher initials for each new academic year as described in Example 1. If you wish to use teacher initials, it is far easier if you do not precede the class name with the year, e.g. use **SL** rather than **4SL**.

Primary schools may wish to use classes named after trees, colours, animals, etc. An alternative is to name classes by year and a single initial (not based on a teacher's name) such as **3A**, **3B**, etc. that remain static year on year.

Changing Year Group Horizontal/Vertical Structures

There may be occasions where you want the pastoral structure for the new academic year to be different to that of the current year. For example:

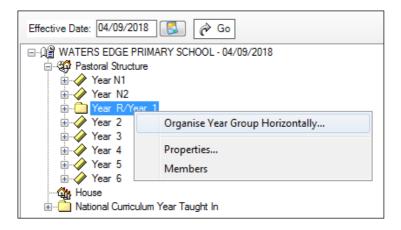
- As a consequence of falling pupil/student numbers. This may require you to change from a horizontal to a vertical structure to enable pupil/students from mixed year groups to be taught in the same class.
- As a consequence of increasing pupil/student numbers. This may require you to change from a vertical to a horizontal structure to enable pupil/students from the same year to be taught in the same class.

 As a consequence of a change in pupil/student numbers across the years, e.g. a low birth rate one year, then a high birth rate two years later. This may require you to change to a combined horizontal and vertical structure.

Changing from a Vertical to a Horizontal Structure

This process may be required if, for example, your pupil/student numbers have increased. This would enable previously merged years, such as Nursery/Reception (vertically structured) to be split into two separate years (horizontally structured) because there are now sufficient pupil/students from the same year group to be taught in one class.

- 1. Select next year's pastoral structure (please see *Opening the Structure of the New Academic Year* on page *19*).
- Expand the **Pastoral Structure** heading by clicking the + icon. Vertically organised year groups can be identified by their names, separated by a forward slash, e.g. **Nursery/Reception**.



3. Right-click the vertically organised year group and select **Organise Year Group Horizontally** from the pop-up menu to display the **Organise Horizontally** dialog.

This dialog enables you to determine the class(es) that should be attached to each year.

4. In the **Class** panel, highlight the class(es) you wish to attach to a year (hold down the **Ctrl** key and click the class names to highlight more than one class) then click the required year group in the **Year Group** panel.

Organise Horizontally		? ×
Organise Horizontally Class ELM PINE ASH OAK	Year Group	
	Image: Contract of the second seco	Cancel

In the previous example, **ELM** and **PINE** are being attached to the Reception (**Year R**).

5. Click the right arrow button in the centre of the dialog to attach the selected class(es) to Reception (**Year R**). The class(es) are moved under the **Year R** heading, as shown in the following example.



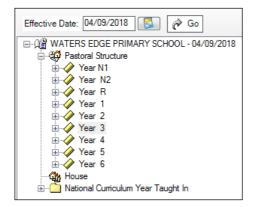
6. Repeat steps 4 and 5 for all the remaining classes in the **Class** panel.

Organise Horizontally		? *			
Organise Horizontally					
Class	Year Group				
	Year R PINE PINE ASH OAK				
Ok Cancel					

NOTE: Each class <u>must</u> be attached to a single year group and therefore, the **Class** panel <u>must</u> be empty before you can complete the process.

7. Click the **Ok** button to save the details.

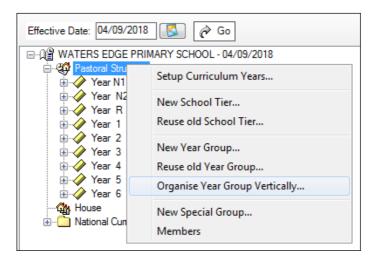
The pastoral structure should now show the two previously merged years as separate years, as shown in the following example.



Changing from a Horizontal to a Vertical Structure

This process may be required if, for example, your pupil/student numbers have decreased. This could allow previously separate years, such as Nursery and Reception (horizontally structured) to be merged into a single year (vertically structured) because there are insufficient pupil/students from the same year group to be taught in one class.

1. Select next year's pastoral structure (please see *Opening the Structure of the New Academic Year* on page *19*).



2. Right-click **Pastoral Structure** and select **Organise Year Group Vertically** from the pop-up menu to display the **Organise Vertically** dialog.

Organise Vertically	? ×
Organise Vertically Mark Year Group to orga vertically:	anise them
V Year N1 Vear R Year R Year 1 Year 2 Year 3 Year 4 Year 5 Year 6	
Ok	Cancel

- 3. Select the check boxes adjacent to the **Year N2** and **Year R** (Nursery and Reception years) you wish to merge into a vertical structure then click the **Ok** button. In the previous example, Nursery and Reception are being merged into a vertical structure.
- 4. Click the **Ok** button to merge the selected years, which are then displayed in the pastoral structure separated with a /, as shown in the following example.

Effective Date: 04/09/2018 🚱 🌈 Go				
B-A WATERS EDGE PRIMARY SCHOOL - 04/09/2018				
- 😳 Pastoral Structure				
🗄 🗋 Year N1/Year N2				
🗓 🤣 Year R				
🗓 🤣 Year 1				
🗄 🤣 Year 2				
🕀 🥢 Year 3				
🕀 🤣 Year 4				
😥 🤣 Year 5				
🗄 🤣 Year 6				
🗄 🗂 National Curriculum Year Taught In				

Saving the Amended Pastoral Structure

Once the required changes have been made to the pastoral structure, click the **Save** button to save the structure. This may take some time depending on the number of changes that have been made.



Adding Intake/Admission Groups

Intake and admission groups are used to maintain lists of the applicants who have registered an interest in being taught at your school. It is now possible to create an intake group containing one or more admission groups. For example, an intake group consisting of separate admission groups for those joining in Autumn, Spring and Summer terms might be set up for your Nursery.

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

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

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

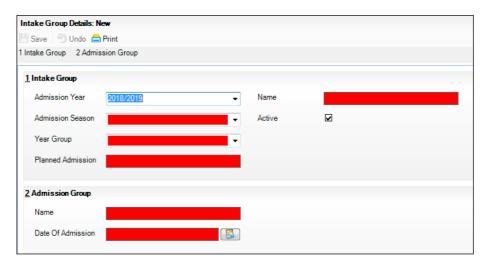
This is also a good time to delete or make inactive any unwanted admission groups. Detailed instructions on adding and maintaining admission groups can be found in the appropriate *Admissions* handbook.

1. Select Routines | Admission | Admission Groups | Setup to display the Find Intake Group browser.

🐦 Find Intake Group							
Name Admission Year	<any></any>	Admissio Vear Gro	on Season oup	<any> <any></any></any>	✓ Status	Active	•
Name		Admission Year	Admission Se	eason Year Group		Planned Admission	Status
2017/2018 - Autum	ın Year N2	2017/2018	Autumn	Year N2		12	Active
2017/2018 - Autum	ın Year R	2017/2018	Autumn	Year R		40	Active
2017/2018 - Autum	n Year N1	2017/2018	Autumo	Year N1		8	Active

- 2. Carry out a search to ensure that the intake group does not already exist.
- 3. Click the **New** button to display the **Intake Group Details** page. Mandatory fields are highlighted in red. The page will look slightly different depending on whether you have set up SIMS to allow multiple admission groups to be added.

In addition, Own Admission Authority schools who have applied a Basic or Full Admissions Licence will see two additional fields (**Admission Policy** and **Numbers to Rank**).



- 4. In the **Intake Group** panel, select the **Admission Year** to which the intake group relates (e.g. 2018/2019) from the drop-down list (this defaults to the current academic year).
- 5. Select the required **Admission Season** (**Autumn**, **Spring** or **Summer**) or, if the intake group does not apply to a specific season, select **Integrated** from the drop-down list.

<u>1</u> Intake Group				
Admission Year	2018/2019	•	Name	2018/2019 - Autumn Year 2
Admission Season	Autumn	•	Active	
Year Group	Year 2	•		
Planned Admission	20			

- 6. Select the required **Year Group** from the drop-down list.
- 7. Enter the number of applicants that you expect to admit to this intake group in the **Planned Admission** field.
- Only Independent and Own Admission Authority Maintained schools with a Basic or Full Admissions Licence can select a previously defined admissions policy from the **Admission Policy** drop-down list. Select a policy, if required.
- 9. Independent and Own Admission Authority Maintained schools with a Basic or Full Admissions Licence can enter the number of applications that should be ranked in the **Numbers to Rank** field. By default, all applications in an intake are ranked. If you have agreed with your Local Authority that you will rank only a certain number of applications, enter the agreed number in this field.
- If you press the **Tab** key to move to the **Name** field or click in this field, a default name is supplied for the intake group, based on the **Admission** Year, Admission Season and Year Group, e.g. 2018/2019 Autumn
 Year 1. The default name can be amended, if required.

11. The **Active** check box is selected by default and indicates that the intake group is available for use. Deselect this check box only if you wish to create intake groups that will be used at some point in the future (they will not be displayed in the **Find Intake Group** browser by default).

Adding One or More Admission Groups

This section is applicable if SIMS is set up to allow the use of multiple admission groups and describes how to add one or more admission groups to an intake group. If you are not sure, please refer to the graphics in the previous section. If the second panel is labelled **Admission Groups**, SIMS is set up to allow multiple admission groups. If the second panel is labelled **Admission Group**, SIMS is <u>not</u> set up to allow multiple admission groups.

If SIMS is <u>not</u> set up to use multiple admission groups, please proceed to *Adding an Admission Group (Multiple Groups Not Enabled)*.

1. From the **Admission Groups** panel, click the **New** button to display the **Add Admission Group** dialog.

Mage Add Admission G	iroup		? <mark>- x -</mark>
Admission Group			
Name	Nursery - Autumn		
Date Of Admissio	on 04/09/2018		
		ОК	Cancel

 Enter a Name for the admission group together with the Date Of Admission. Alternatively, click the Calendar button and select the required date.

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

- 3. Click the **OK** button to add the admission group and return to the **Intake Group Details** page.
- 4. If any further admission groups are required, click the **New** button in the **Admission Groups** panel and repeat steps 2 and 3.

Name	Date Of Admission	New 📄
Nursery - Autumn	04/09/2018	Copen
		💥 Delete

5. Click the **Save** button to create the intake and admission groups.

Once admission groups have been created, you can add any applicants to SIMS and assign them to the required admission group.

Adding an Admission Group (Multiple Groups Not Enabled)

1. Clicking in the **Name** field provides a default name for the group, which can be overtyped as required.

2 Admission Group	
Name	2018/2019 - Autumn Year 2 (A)
Date Of Admission	04/09/2018

- 2. Enter the **Date Of Admission** for the group.
- 3. Click the **Save** button to create the intake and admission group.

Once admission groups have been created, you can add any applicants to SIMS and assign them to the required admission group.



Importing Admissions and Transfer Files (ATF)

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

Importing Common Transfer Files (CTFs)

This section provides a summary of the steps required to import a CTF.

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

If any of the pupil/students in the CTF already exist in the system, any blank fields in their record are updated with data from the CTF. Any existing data is not overwritten, as it is deemed to be the most up-to-date information. Any such information is highlighted in the Exception Log that is displayed at the end of the import process.

Appropriate intake/admission groups must be created before you can import CTF files (please see *Adding Intake/Admission Groups* on page *32*).

1. Select Routines | Data In | CTF | Import CTF to display the Select the CTF import type dialog. This dialog varies, depending on your school phase.

Select the CTF import type
Import Type
General
Add Data for New Pupils Only
Add Data for Existing Pupils Only
Add KS1 for Existing Pupils Only
Add KS2 for Existing Pupils Only
Add Phonics Data for Existing Pupils Only
Select 🔀 Cancel

2. Highlight the required CTF import type then click the **Select** button to display a message asking you to confirm whether you wish to change the matching scale.

SIMS .net	2	x
?	Matching Scale 2 selected. Do you wish to change the CTF Matching Scale?	
	Yes No	

For detailed instruction on importing a CTF file and using the CTF Matching utility, please refer to the *Using the CTF Matching Screen* mini guide or to the *Importing and Exporting CTFs* chapter of the *Managing Pupil/Students* handbook.

ort Selection	3 Exception Log					
•	Student Address	¥	Student Contacts	V	Looked After	V
\checkmark	Assessment Data	V	School History	\checkmark		
V	Programme of Study(PoS) Assessments	¥	FSM History	V		
	▼ Effectiv	e Date	09/03/2018			
)	Admit On	Year Gro	bup			
i Year 2 (A)	04/09/2018	Year 2				
					Proceed For Match	Import
	V	Assessment Data Programme of Study(PoS) Assessments Effectiv Admit On	Student Address Assessment Data Programme of Study(PoS) Assessments	☑ Student Address ☑ Student Contacts ☑ Assessment Data ☑ School History ☑ Programme of Study(PoS) ☑ FSM History ✓ Assessments ☑ FSM History ✓ Effective Date 09/03/2018 ☑ ☑ Admit On Year Group	Student Address Assessment Data Assessment Data Programme of Study(PoS) FSM History Assessments Effective Date 09/03/2018 D Admit On Year Group	Image: Student Address Image: Student Contacts Image: Looked After Image: Assessment Data Image: School History Image: School History Image: School History Image: Programme of Study(PoS) Image: FSM History Image: School History Image: S

3. In the **Data to be Imported** panel, indicate the data items you wish to import from the CTF by selecting the appropriate check boxes.

- 4. In the **Import Selection** panel, browse to the location of the CTF by clicking the **Open** button adjacent to the **CTF File** field to display the **Select Import File** dialog. Navigate to the required location, highlight the CTF then click the **Open** button to return to the **Import to CTF** page.
- 5. Select **Pre-Admission** from the **Place new pupils** in drop-down list to import the pupil/student into an admission group. The **On-roll** option is also available, but it is unlikely that September admissions would be imported directly on-roll.
- 6. Click the **Import CTF** button to start the import. Details of any errors are displayed in the Exception Log at the bottom of the **Import CTF** page.
- 7. Once you have finished importing the CTF, edit the details of the imported pupil/students as required.



Checking Dates for Part-Time Pupil/Students

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

1. Select **Focus | Pupil** (or **Student**) | **Pupil** (or **Student**) **Details** then select the required pupil/student from the **Find Student** browser.

Class	4ES		•	- Hou	ise					
Year Group	Year 4			Yea	r Taught Ir	1	Cu	rriculum Ye	ar 4	
Enrolment Status	Guest pupil			Boa	rder Status	5	No	t a Boarde	r	
Admission Date	04/09/2018			Adm	nission Nu	mber				
Former UPN			*	Atte	ndance Mo	ode	Al	day		
UPN	N8232999110)1	6	Loc	al UPN					
	04/09/2018	31/12	2/2018							📂 Op 🂢 De
										History
Early Years Attendance Patterns	Start date	End date	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Ne
										📄 Op
	4			1	11				•	~ De

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

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3. Check or amend the **End Date** in the **Part Time Details** table for any parttime pupil/students who will no longer be part-time, by clicking the **Open** button to display the **Edit Part-time Attendance** dialog.

Add Part-time	Attendance	
Start Date End Date	09/03/2018	
	ОК	Cancel

- 4. Add or edit the **End Date** as required then click the **OK** button. The **End Date** is then displayed in the **Part Time Details** table.
- 5. Select **All day** from the **Attendance Mode** drop-down list.
- 6. Click the **Save** button to save any changes.

Once you have determined which pupil/students are part-time (i.e. which pupil/students are AM only or PM only), you need to define the part-time sessions and dates for the AM/PM groups for all or part of the coming year. Running this routine will also ensure that pupil/students who are no longer part-time will have their attendance records amended accordingly (please see *In SIMS Attendance - Using the Part-Time Pupil/Students Routine to Add Not Required Codes* on page 69).



Recording Leavers

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

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

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

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

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

- 1. Select Routines | Pupil (or Student) | Leavers to display the Find Student(s) browser.
- 2. Search for the required pupil/student then double-click their name to display the **Manage Student(s) Leaving Details** page.
- 3. If you wish to assign a group of pupil/students as leavers, search on the appropriate **Year** or **Reg Group** by selecting from the appropriate drop-down lists. Highlight the required pupil/students using any of the following methods:
 - To select all the pupil/students displayed in the browser, select All from the Select drop-down menu.

6	Select 🔹
	All
	Selected

- To select a group of pupil/students, highlight them using any of the following methods:
 - Hold down the **Ctrl** key and click each pupil/student to be selected.
 - To highlight sequentially listed pupil/students, click the first name in the list, hold down the Shift key then click the last name in the list.
- Once the required pupil/students have been highlighted, click the Select button to add them to the Students panel.

The selected pupil/students are then transferred to the **Students** panel.

Save 📥 Print										
Leaving Information	2 Students									
<u>1</u> Leaving Informat	ion								_	
Date of Leaving	31/	07/2018		Reason for	leaving End	d of phase transfer - Ma	aintair 👻 🛛	Assign to All		
Destination after Le	aving							of Assign to Selected	ł	
Destination Instituti	on 🗌					2			_	
Destination Expect	ed 🗌			Grounds fo			-			
Start Date										
2 Students										
Name	Year Group	Class	Adm. No.	Date of Admission	Date of Leaving	Reason for Leaving	Destination	n Institution	*	Remove
Adams, Laura	6	6VC	001235	01/09/2011						🔄 Clear
Amnar, Tarak	6	6VC	001236	01/09/2011					=	-
Astwick, Gwenneth	6	6VC	001155	01/09/2010					-	
Bond, Steve	6	6VC	001237	01/09/2011						
Cameron, Zara	6	6KH	001156	01/09/2010						
Carter, Hannah	6	6VC	001238	01/09/2011						
Churchill, Martin	6	6VC	001239	01/09/2011						
Cookson, Harry	6	6VC	001240	01/09/2011						
Courses Installe	6	6VC	001241	01/09/2011						
Cosenza, Isabella	6	6VC	001242	01/09/2011						
Defeo, Lorenzo	6	6KH	001243	01/09/2011						
		6VC	001244	01/09/2011						
Defeo, Lorenzo	6		001158	01/09/2010						
Defeo, Lorenzo Dennis, Tommy	6 6	6VC								
Defeo, Lorenzo Dennis, Tommy Dixon, Stephanie		6VC 6KH	001245	01/09/2011						
Defeo, Lorenzo Dennis, Tommy Dixon, Stephanie Dolittle, Susy	6		001245 001246	01/09/2011 01/09/2011						
Defeo, Lorenzo Dennis, Tommy Dixon, Stephanie Dolittle, Susy Edwards, Imogen	6 6	6KH								

- 4. In the **Leaving Information** panel, enter the **Date of Leaving** or click the **Calendar** button then select the required date.
- 5. Select the **Reason for leaving** from the drop-down list.

- 6. Enter the **Destination after Leaving**, if required. Alternatively, apply the **Reason for leaving** to one set of pupil/students (as described in the next step) then enter the **Destination after Leaving** for a different, or subset of pupil/students.
- 7. Search for and select the **Destination Institution**.
- 8. Select the **Destination Expected Start Date** from the Calendar.
- 9. Highlight the pupil/students to whom this information applies using the **Ctrl** and **Shift** keys then clicking their names (as described in step 3) then click the **Assign to Selected** button. If the information applies to all the pupil/students in the list, click the **Assign to All** button.
- 10. If an error has been made, highlight the pupil/student, correct the information in the **Leaving Information** panel then click the **Assign to Selected** button.
- 11. To remove a pupil/student from the list, highlight their name then click the **Remove** button.
- 12. To clear the contents of the **Date of Leaving**, **Reason for Leaving** and **Destination after Leaving** columns in the **Students** panel, highlight the required pupil/students then click the **Clear** button. Re-enter the information as required.
- 13. Click the **Save** button to save the changes. The selected pupil/students are recorded with a date of leaving on the date specified.



Exporting Common Transfer Files (CTFs)

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

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

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

This section provides a summary of the steps required to export a CTF.

1. Select Routines | Data Out | CTF | Export CTF to display the Select the CTF export type dialog.

Select the CTF export type	
Export Type	
Early Years Foundation Stage data (FSP)
General	
KS1	
KS1 excluding Tests and Tasks	
KS2	
Phonics Test Results	
Select	💥 Cancel

Highlight the required CTF export type then click the **Select** button to display the **Export CTF** page. The page name is appended with the option selected in the previous dialog. For detailed instruction on exporting a CTF file, please refer to the *Importing and Exporting CTFs* chapter of the *Managing Pupil/Students* handbook.

2. In the **Data to be Exported** panel, ensure that the check boxes relating to the data items you wish to export are selected.

1 Data to be Exported					
Student Basic Details	V	Student Address		Student Contacts	V
SEN Information	V	Assessment Data Include KS1 Tasks/Tests		School History	V
Attendance Summary		Looked After	V	FSM History	V

3. Select the status of the pupil/students you wish to include in the CTF file from the **View** drop-down list (e.g. **Leavers this year**) in the **Student Options** panel.

2 Student Options						_		
Effective Date	09/03/2018 🚺 View	Current students	•	Include students already exported	✓	4	Refresh Students	

- 4. If you have already created a CTF file for some of the pupil/students but wish to include them in this CTF, select the check box to include pupil/students already exported in the export file.
- 5. Click the **Refresh Students** button to update the list of pupil/students displayed based on your selections. You can change the display order by clicking any of the column headings.

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6. In most circumstances, a single year group will be selected, such as Year 6. This is achieved by selecting the required year from the **Year Grp** drop-down list as shown in the following graphic.

UPN	Preferred Surname	Preferred Forename	Reg Grp 🔍	Year Grp 🔻 🖵	Year Taught 📃	Previous Destination	Destination LA/Other	Destination School
B820200106090	Acton	Samantha	6VC	6	6			
Q820200106091	Amoso	Rosanna	бКН	6	6			
E820200106092	Amoso	Silv	бКН	6	6			
U820200106093	Amoso	Stephanie	6КН	6	6			
Y820200106001	Andrews	Paul	6КН	6	6			
H820200106094	Angler	Harry	6VC	6	6			
B820200106003	Atkinson	Ben	бКН	6	6			
M820200106002	Atkinson	Ben	бКН	6	6		Avon (Pre Lgr)	<u>^</u>
X820200106095	Baker	James	бКН	6	6		Barking & Dagenham Barnet	
Q820200106004	Bradbury	Christina	6VC	6	6		Bamsley Bath & North East Somerset	
L820200106096	Bradshaw	Jonn	6VC	6	6		Bedford Borough	-
E820200106005	Brown	Jeremy	6KH	6	6			

- 7. Select the **Destination LA/Other** or **Destination School** by clicking in the appropriate cell then selecting from the drop-down list. This can be done on an individual basis or you can select multiple pupil/students as follows:
 - Hold down the **Ctrl** key and click each pupil/student to be selected.
 - To highlight sequentially listed pupil/students, click the first name in the list, hold down the **Shift** key, then click the last name in the list.
 - To select all the pupil/students, right-click anywhere in the table then select **Select All** from the pop-up menu.

UPN	Preferred Surname	Preferred Forename	Reg Grp 📃	Year Grp 🔻 🖵	Year Taught 🔍	Previous Destination	Destination LA/Other	Destination School
B820200106090	Acton	Samantha	6VC	6	6			
Q820200106091	Amoso	Rosanna	бКН	6	6			Select All
E820200106092	Amoso	Silv	бКН	6	6			
U820200106093	Amoso	Stephanie	бКН	6	6			
Y820200106001	Andrews	Paul	бКН	6	6			
H820200106094	Angler	Harry	6VC	6	6			
B820200106003	Atkinson	Ben	бКН	6	6			
M820200106002	Atkinson	Ben	бКН	6	6			
X820200106095	Baker	James	бКН	6	6			
Q820200106004	Bradbury	Christina	6VC	6	6			
L820200106096	Bradshaw	Jonn	6VC	6	6			
E820200106005	Brown	Jeremy	бКН	6	6			

8. Click the **Export CTF** button to create the export file.

After the file has been created, any errors are displayed in the **Exception Log** panel, together with the number of pupil/students in the file, the number processed and the number not exported.

number of students	s in file: 59 Num	ber of students proces	sed: 59	Number o	of students not exported:			
UPN	Preferred Sumame	Preferred Forename	Gender	Date of Birth	Error Description	File Name	-	Save
L820200106096	Bradshaw	Jonn	M	02/02/2004	No ENG Results exported since ther	8232999_CTF_8234321_006		Print
L820200106096	Bradshaw	Jonn	М	02/02/2004	No ENG Results exported since ther	8232999_CTF_8234321_006		
A820200106097	Bukolt	Krystal	F	05/09/2003	No ENG Results exported since ther	8232999_CTF_8234321_006	=	
A820200106097	Bukolt	Krystal	F	05/09/2003	No ENG Results exported since ther	8232999_CTF_8234321_006		
A820200106097	Bukolt	Krystal	F	05/09/2003	No ENG Results exported since ther	8232999_CTF_8234321_006		
P820200106098	Cardy	Carly	F	11/11/2003	The 9th point for FSP PSE AS2 has	8232999_CTF_8234321_006		
A820200106012	Douglas	David	M	05/02/2004	The 9th point for FSP PSE AS2 has	8232999_CTF_8234321_006		
F820200106106	Gorman	Michael	M	02/03/2004	The 9th point for FSP PSE AS3 has	8232999_CTF_8234321_006		
G820200106016	Graham	Elaine	F	12/11/2003	The 9th point for FSP PSE AS1 has	8232999 CTF 8234321 006	-	

Any errors must be corrected before the pupil/student can be successfully included in the CTF export file.

9. Navigate to the location of the **CTF Export Directory** (as defined in **Tools** | **Setups** | **CTF**) then identify the newly created XML file for export. The CTF can be transferred by a local secure file transfer mechanism, e.g. Secure Access. Please contact your Local Authority if you are unsure how to transfer the CTF.

Completed

Setting up the Promotion Mapping for the New Academic Year

Setting up the promotion paths for the pastoral structure plays a key part in the end of year procedures and ensures that pupil/students move from their current year group and class into the correct year group in the new academic year. This process is used to set the path for year groups and classes, but it is also possible to specify a promotion path for individual pupil/students in case there are any exceptions (please see *Viewing/Setting the Promotion Path for Individual Pupil/Students* on page *47*).

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

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

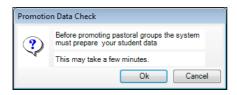
BEFORE PROCEEDING: Please check that you have carried out the following:

• Recorded any changes to teaching staff (added new teachers and added dates of leaving for any leavers).

• Created the new academic year.

• Amended your pastoral structure as required, such as adding new classes.

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



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

Validate N	Aemberships
	Your group memberships are currently being checked and group membership rules enforced . This is to support the annual promotion process. Please wait

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

ademic Yea	r:				
romote from	Acad	emic Year 2017/2018			▼ Load
ear Group					
Year Group		Pror	motion Path		
verride mem	bership 🗌]			Set Default
	bership 🗌]			Set Default
ass		-	Currentines.	Promoto	
	bership Registration Group	-	Supervisor	Promote Registration Tutor	Set Default Promote Other Supervisors
ass	Registration	-	Supervisor		Promote Other
ass	Registration	-	Supervisor	Registration	Promote Other
override mem ass Year	Registration	-	Supervisor	Registration	Promote Other
ass	Registration	-	Supervisor	Registration	Promote Other
ass	Registration	-	Supervisor	Registration	Promote Other
ass	Registration	-	Supervisor	Registration	Promote Other
ass Year	Registration Group	Promotion Path	Supervisor	Registration	Promote Other
ass	Registration Group	Promotion Path	Supervisor	Registration	Promote Other

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

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

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

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

Academic Yea	r						
Promote from	A	cadem	ic Year 2017/2018			▼ Load	
ear Group							
Year Group			Pro	motion Path			-
► N1			N2			•	=
N2			R			•	
R			1				
1			2			•	
2			3			Ī	-
		L.	Promotion Path	Registration Tutor	Promote	Set Defau Promote Other	ult
lass	bership Registra Group	_	Promotion Path	Registration Tutor	Promote Registration Tutor		-
lass	Registra	_	Promotion Path	Registration Tutor	Registration	Promote Other	-
i lass Year	Registra Group	_	Promotion Path		Registration Tutor	Promote Other Supervisors	E
Year Year	Registra Group N1 AM	_	Promotion Path	Ms Lisa Lawson	Registration Tutor	Promote Other Supervisors	-
Year N1 Year N1	Registra Group N1 AM N1 PM	_	Promotion Path	Ms Lisa Lawson	Registration Tutor	Promote Other Supervisors	-
Year Year N1 Year N1 Year N2	Registra Group N1 AM N1 PM PM AM	_	Promotion Path	Ms Lisa Lawson Mrs Rebecca Lorrin Ms Lisa Lawson	Registration Tutor	Promote Other Supervisors	-
 Year N1 Year N1 Year N2 Year N2 	Registra Group N1 AM N1 PM PM AM AM	_	Promotion Path	Ms Lisa Lawson Mrs Rebecca Lorrin Ms Lisa Lawson Mrs Rebecca Lorrin	Registration Tutor	Promote Other Supervisors	-
Year N1 Year N1 Year N2 Year R/Yea	Registra Group N1 AM N1 PM PM AM AM ELM PINE	_	Promotion Path	Ms Lisa Lawson Mrs Rebecca Lorrin Ms Lisa Lawson Mrs Rebecca Lorrin Mr Richard Perrin	Registration Tutor	Promote Other Supervisors	-

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

Year	Registration Group	Promotion Path	Registration Tutor	Promote Registration Tutor	Promote Other Supervisors	•
Year N1	N1 AM		Ms Lisa Lawson			_
Year N1	N1 PM		Mrs Rebecca Lorrin			
Year N2	PM		Ms Lisa Lawson			
Year N2	АМ		Mrs Rebecca Lorrin			
Year R/Yea	ELM		Mr Richard Perrin			
Year R/Yea	PINE		Mr Oliver Joyner			Ŧ

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

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

- 8. If any existing Classroom Assistants or Learning Support Assistants should be promoted into the next academic year with the class, select the **Promote Other Supervisors** check box.
- 9. Select the **Override Membership** check box in both the **Year Group** and **Class** panels the first time you carry out the promotion mapping process.

This ensures that any existing memberships (however they were defined) are overwritten. If you repeat the promotion process, you can decide whether to overwrite the existing memberships by selecting the check box as required. For example, if you had originally stated that pupil/students in the **Pine** class should be promoted to the **Ash** class and subsequently wanted them to go from **Pine** to **Oak**, you would need to select the **Override Membership** check box in the **Class** panel.

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

- 10. Click the **Finish** button and then **Save** the settings.
- 11. Click the **Map** button on the toolbar at any point to return to the **Setup Promotion Mapping** dialog.

SIMS displays the **Promote Pastoral Groups** page, which lists the current year groups.

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

Viewing/Setting the Promotion Path for Individual Pupil/Students

1. Double-click the current year group for which you wish to view or set individual promotion paths, to view the promotion path for each pupil/student.

Na	ame	Unusual	Current Year Group	Next Year Group	Current Registration Group	Next Registration Group	
÷	Current Year Group: N2						
÷	Current Year Group: R						
÷	Current Year Group: 1						
E	Current Year Group: 2						
	Adams, Laura		2	3	2JB	3TO	
	Amnar, Tarak		2	3	2JB	3TO	
	Astwick, Gwenneth		2	3	2JB	3TO	
	Bond, Steve		2	3	2JB	3TO	
	Cameron, Zara		2	3	2GH	3CB	
Ø.	Carter, Hannah		2	3	2JB	3TO 🕇	
	Churchill, Martin		2	3	2JB	Short Name	
	Cookson, Harry		2	3	2JB	зто	
	Cosenza, Isabella		2	3	2JB	3CB	
	Defeo, Lorenzo		2	3	2JB	X STO	///
	Dennis, Tommy		2	3	2GH	3CB	
	Dixon, Stephanie		2	3	2JB	3TO	
_	D. Fail C		2	2	210	27.0	

- 2. You can customise the view on this screen by selecting an option from the **Customize** drop-down list.
 - Select **Sort** to display the **Sort** dialog, which enables you to order the contents of the columns, as shown in the following example.

Sort	
Sort students by Name	 Ascending Descending
Then by Current Year Group	 Ascending Descending
Then by (none) -	 Ascending Descending
Then by (none)	 Ascending Descending
Ok Can	cel Clear All

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 Click the **Customize** button down arrow and select **Group By** to display the **Group By** dialog, which enables you to change the groupings, as shown in the following example.

Group By
Group students by
Next Year Group 👻
Then by (none)
Then by (none)
Then by (none)
Ok Cancel Clear All

• Select **Columns** to display the **Customise Columns** dialog, which enables you to choose the columns you wish to include in the display.

lumns		
Show C	Column	Column Name
	V	Unusual
	V	Current Year Group
	V	Next Year Group
	V	Current Registration Group
	V	Next Registration Group
		Current National Curriculum Year
		Next National Curriculum Year
		Ok Cance

3. Once expanded, you can change the year or class for individual pupil/students by clicking in the appropriate column and selecting a different year or class from the drop-down list. The change appears in red and the **Unusual** check box is selected automatically to indicate that the change falls outside the normal mapping set previously (using the **Setup Promotion Mapping** dialog). Repeat the process for any other pupil/students, if required.

Multiple pupil/students can be highlighted using any of the following methods:

- Hold down the **Ctrl** key then click each pupil/student you wish to select.

	-	-		
Adams, Laura	2	3	2JB	3TO
Amnar, Tarak	2	3	2JB	3TO
Astwick, Gwenneth	2	3	2JB	3TO
Bond, Steve			2JB	зто
Cameron, Zara	2	3	2GH	3CB
Carter, Hannah			2JB	ЗТО
Churchill, Martin			2JB	зто
Cookson, Harry	2	3	2JB	3TO
Cosenza, Isabella			2JB	зто
Defeo, Lorenzo	2	3	2JB	3TO
Dennis, Tommy		3	2GH	ЗСВ
Dixon, Stephanie	2	3	2JB	3TO

• To highlight sequentially listed pupil/students, click the first name in the list, hold down the **Shift** key then click the last name in the list.

NOTE: If the **Filter** button is deselected, all Year Groups and classes are available for selection from the drop-down lists, not just those that are associated with the chosen **Year Group** or **Class**.



For example, a pupil/student currently in **Year Group R** would normally be expected to promote into **Year Group 1**. It is possible (for whatever reason) that this pupil/student will actually be promoted into **Year Group 2** in the forthcoming academic year. To enable you to achieve this, click the **Filter** button and select the required **Year Group** and **Class** from the drop-down lists.

4. Click the **Save** button to save the promotion mappings. The promotion occurs at the beginning of the next academic year. A warning is displayed if any unusual promotions have been set. Accept the warning by clicking the **Yes** button.



Checking the Registration Tutors Assigned

Once the promotion mapping process is complete, you are strongly advised to check the registration group assignments in the pastoral structure.

- 1. Select Focus | School | Pastoral Structure | Next Academic Year Structure.
- Click the + icon adjacent to Pastoral Structure to reveal each registration group.
- 3. Right-click the name of each registration group and select **Properties** from the pop-up menu to display the **Class** dialog.
- If necessary, add or change the **Registration Tutor** by clicking the Browser button, searching for then selecting the required person. Click the OK button.
- 5. If two registration tutors share the group, click the New button adjacent to the Supervisors panel to display the Supervisor Properties table. Select the Role of Joint Main Supervisor from the drop-down list then select the required person by clicking the Browser button then searching for and selecting the required person from the Select person dialog. Click the OK button to confirm the selection.
- 6. Click the **OK** button to return to the pastoral structure then click the **Save** button once you have assigned all the required registration tutors.

Completed

Changing the Status of Applications to Offered or Accepted

This section describes how to change the status of applications to your school for the forthcoming academic year in bulk. Applications can be added manually or imported via ATF or CTF. When added, an application is automatically given a status of **Applied**. If required, you can then offer places to applicants you wish to join your school (**Offered**) and then change the status of the application to **Accepted** once you have received confirmation that they will be joining. It is possible however, to change an application status from **Applied** to **Accepted** or even straight to **Admitted**, if required.

It is also possible to change the application status of individual applicants. For more information, please refer to the appropriate *Admissions* handbook.

This section assumes that you have added all of the required applicants via **Focus | Admission | Application**, and that you have imported via CTF or ATF.

Finalising Offers

If you wish to offer places to applicants, please follow the instructions outlined in this section. If you do not want to record offers made, but wish to identify applicants who have accepted a place at your school, please proceed to *Accepting Applicants*.

1. Select Routines | Admission | Finalise Offers to display the Find Intake Group browser.

New Searc	sh 🗁 Open 💢 De	lete 📥 Print 🗔 Bro	wse 👐 Next 👕 Pi	evious			
Name			Admission Season	<any></any>	✓ Status	Active	•
Admission Year	<any></any>	•	Year Group	<any></any>	▼		
Name		Admission Year	Admission	Season Year Group)	Planned Admission	Status
2017/2018 - Autum	nn Year N2	2017/2018	Autumn	Year N2		12	Active
2017/2018 - Autum	nn Year R	2017/2018	Autumn	Year R		40	Active
2017/2018 - Autum	ve Venc N1	2017/2018	Autumn	Year N1		9	Active

2. Search for then double-click the required intake group to display the **Finalise Offers** page.

anse	Offers - 2018/2019 - Autumn Year	1					
Save	🔄 Undo 📥 Print						
ummary	y 2 Applications						
Summ	nary						
Planned	d Admission 20	Offe	ered	0			
Total Ar	pplicants 11	Acc	epted	0			
Applied	i <u>11</u>	With	hdrawn	0			
. ppilos			nitted	0			
		Reje	ected	0			
Applic	cations						
Applic		Gender	DOB	App. Status	Applied	Offered	Rejected
L	Cations Late Name Adams, Adam	Gender Male	DOB 31/08/2013	App. Status Applied	Applied	Offered	Rejected
L	Late Name					Offered	Rejected
L	Late Name Adams, Adam	Male	31/08/2013	Applied	× •	Offered	Rejected
	Late Name Adams, Adam Baggley, Chris	Male Male	31/08/2013 21/08/2013	Applied Applied	✓ ✓	Offered	Rejected
L	Late Name Adams, Adam Baggley, Chris Cadilia, Celia	Male Male Female	31/08/2013 21/08/2013 07/05/2013	Applied Applied Applied		Offered	Rejected
L	Late Name Adams, Adam Baggley, Chris Cadilia, Celia Dahl, Nashkabir	Male Male Female Female	31/08/2013 21/08/2013 07/05/2013 30/06/2013	Applied Applied Applied Applied		Offered	Rejected
	Late Name Adams, Adam Baggley, Chris Cadiia, Celia Dahl, Nashkabir Eagle, Ruby Falmer, Katie-May Gardener, Hany	Male Male Female Female Female Female Male	31/08/2013 21/08/2013 07/05/2013 30/06/2013 20/03/2013 12/06/2013 14/02/2013	Applied Applied Applied Applied Applied		Offered	Rejected
	Late Name Adams, Adam Baggley, Chris Cadila, Celia Dahi, Nashkabir Eagle, Ruby Falmer, Katie-May Gardener, Harry Hacket, Charlie	Male Male Female Female Female Female Male Male	31/08/2013 21/08/2013 07/05/2013 30/06/2013 20/03/2013 12/06/2013 14/02/2013 13/12/2012	Applied Applied Applied Applied Applied Applied Applied Applied		Offered Offered 	Rejected
	Late Name Adams, Adam Baggley, Chris Cadilia, Celia Dahl, Nashkabir Eagle, Ruby Falmer, Katie May Gardener, Harry Hacket, Charlie Idle, Dylan	Male Male Female Female Female Male Male Male	31/08/2013 21/08/2013 07/05/2013 30/06/2013 12/06/2013 12/06/2013 14/02/2013 13/12/2012 08/03/2013	Applied Applied Applied Applied Applied Applied Applied Applied Applied		Offered 	Rejected
	Late Name Adams, Adam Baggley, Chris Cadila, Celia Dahi, Nashkabir Eagle, Ruby Falmer, Katie-May Gardener, Harry Hacket, Charlie	Male Male Female Female Female Female Male Male	31/08/2013 21/08/2013 07/05/2013 30/06/2013 20/03/2013 12/06/2013 14/02/2013 13/12/2012	Applied Applied Applied Applied Applied Applied Applied Applied		Offered	Rejected

The **Summary** panel displays figures for the **Planned Admission**, **Total Applicants** and the number of applicants who have **Applied**. Own Admission Authority schools are also provided with the **Late Applications** field.

Figures for the number of places **Offered**, **Accepted**, **Withdrawn**, **Admitted** and **Rejected** (Independent schools only) are updated as applicable information is edited and saved.

The **Applications** panel shows all the applicants who have applied for a place at your school, together with the status of their application.

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3. To change the application status, click the required cell for each applicant, as shown in the following graphic.

naliseOff	fers - 2018/2019 - Autumn Year	1					
Save 🔄) Undo 📥 Print						
Summary	2 Applications						
Summary	,						
Planned Ad	dmission 20	Offe	ered	0			
Total Appli	Total Applicants 11		epted	0			
				0			
Applied	Applied 11						
		Adm	nitted	0			
		Reje	ected	0			
Application	ons						
		Gandar	DOR	Ann Status	Applied	Offered	Painstad
Late	Name	Gender	DOB 31/08/2013	App. Status Applied	Applied	Offered	Rejected
	Name Adams, Adam	Male	31/08/2013	Applied	Applied 🗸	Offered	Rejected
Late	Name						Rejected
Late	Name Adams, Adam Baggley, Chris	Male Male	31/08/2013 21/08/2013	Applied Applied		✓ ✓	Rejected
Late	Name Adams, Adam Baggley, Chris Cadilia, Celia	Male Male Female	31/08/2013 21/08/2013 07/05/2013	Applied Applied Applied		· · · · · · · · · · · · · · · · · · ·	Rejected
Late) Name Adams, Adam Baggley, Chris Cadilia, Celia Dahl, Nashkabir	Male Male Female Female	31/08/2013 21/08/2013 07/05/2013 30/06/2013	Applied Applied Applied Applied Applied			Rejected
Late	Name Adams, Adam Baggley, Chris Cadilia, Celia Dahl, Nashkabir Eagle, Ruby	Male Male Female Female Female	31/08/2013 21/08/2013 07/05/2013 30/06/2013 20/03/2013	Applied Applied Applied Applied Applied			
Late	Adams, Adam Adams, Adam Baggley, Chris Cadifa, Cela Dahl, Nashkabir Eagle, Ruby Falmer, Katie-May	Male Male Female Female Female Female	31/08/2013 21/08/2013 07/05/2013 30/06/2013 20/03/2013 12/06/2013	Applied Applied Applied Applied Applied Applied			
Late	Adams, Adam Adams, Adam Baggley, Chris Cadila, Celia Dahl, Nashkabir Eagle, Ruby Fahmer, Kate-May Gardener, Hany	Male Male Female Female Female Female Male	31/08/2013 21/08/2013 07/05/2013 30/06/2013 20/03/2013 12/06/2013 14/02/2013 13/12/2012 08/03/2013	Applied Applied Applied Applied Applied Applied Applied Applied Applied			
Late	Adams, Adam Adams, Adam Baggley, Chris Cadiia, Celia Dahl, Nashkabir Eagle, Rudy Fahrer, Kaie-May Gardenet, Hany Hacket, Charlie	Male Male Female Female Female Female Male Male	31/08/2013 21/08/2013 07/05/2013 30/06/2013 20/03/2013 12/06/2013 14/02/2013 13/12/2012	Applied Applied Applied Applied Applied Applied Applied Applied			

Accepting Applicants

This section describes how to record applicants who have accepted a place at your school. This is achieved by changing the application status to **Accepted**.

The following instructions demonstrate how this can be achieved for all pupil/students in an intake group. It can also be achieved at individual pupil/student level via **Focus | Admission | Applicants**.

1. Select Routines | Admission | Accept Applications to display the Find Intake Group browser.

🄊 Find Intake G	h 💪 Open 💥 Delete	📥 Print 🛛 🐺 Br	rowse 😽 Next	Previous				
Name Admission Year <any></any>		Admission		son <any></any>		✓ Status	✓ Status Active	
Name	Shily>	Admission Yea		sion Season	Year Group	•	Planned Admission	Status
2017/2018 - Autum	ın Year N2	2017/2018	Autur	nn	Year N2		12	Active
2017/2018 - Autum	ın Year R	2017/2018	Autur	nn	Year R		40	Active
2017/2018 - Autum	n Year N1	2017/2018	Autor		Year N1		8	Active

2. Search for then double-click the required intake group to display the **Accept/Decline Applications** page.

Accept/De	cline Applications - 2018/2019 - A	utumn Year 1					
Save	🕤 Undo 📥 Print						
1 Summary	2 Applications						
<u>1</u> Summa	ry						
	Planned Admission 20	A	ccepted 0				
	Total Applicants 11	V	Vithdrawn 0				
	Applied 3	F	Rejected 1				
	Offered 7	A	dmitted 0				
2 Applica	tions						
Current A	opplication Status Offered	•					
		,					
Name		Gender	DOB	Application Status	Offered	Accepted	Withdrawal
	Baggley, Chri	s Male	21/08/2013	Offered	1		
	Cadilia, Celia	a Female	07/05/2013	Offered	4		
	Dahl, Nashkab	ir Female	30/06/2013	Offered	4		
	Eagle, Rub	y Female	20/03/2013	Offered			
	Hacket, Charlie	e Male	13/12/2012	Offered	✓		
	Idle, Dyla	n Male	08/03/2013	Offered	1		
	Jack, Jessica	a Female	01/09/2012	Offered	✓		

The **Summary** panel displays figures for the **Planned Admission**, **Total Applicants** and the number of applicants who have **Applied** for, or been **Offered**, a place at your school.

Figures for the number of places **Offered**, **Accepted**, **Withdrawn**, **Admitted** and **Rejected** (Independent schools only) are updated as applicable information is edited and saved.

The **Applications** panel displays by default, all applicants with an application status of **Offered**. The display includes the **Name**, **Gender**, date of birth (**DOB**) and **Application Status** of each applicant, together with a tick grid that enables the application status to be amended.

3. Click the **Accepted** column for each applicant who has accepted a place at your school. To accept, click in the cell to put a tick in it. To withdraw, click the **Withdraw** column.

	🗐 Undo 📥 Print						
Summary	2 Applications						
<u>1</u> Summa	ary						
	Planned Admission 20	Δ	ccepted 0				
	Total Applicants 11	V	/ithdrawn 0				
	Applied 3	F	ejected 1				
	Offered 7	A	dmitted 0				
Applica							
	ations						
	ations						
	Application Status Offered	•					
		-					
	Application Status		DOB	Application Status	Offered	Accepted	Withdrawal
Current A	Application Status	Gender	D08 21/08/2013			Accepted	Withdrawal
Current A	Application Status Offered	Gender Male		Accepted		✓ ✓	Withdrawal
Current A	Application Status Offices	Gender Male Female	21/08/2013	Accepted Accepted		V	Withdrawal
Current A	Application Status Ciffered : Baggley, Chri Cadilia, Celic	Gender Male Female	21/08/2013 07/05/2013	Accepted Accepted Accepted		✓ ✓ ✓	Withdrawal
Current /	Application Status Effensi Baggley, Chri Cadilia, Celic Dahl, Nathkabi	Gender Male Female Female Female	21/08/2013 07/05/2013 30/06/2013	Accepted Accepted Accepted Offered		✓ ✓ ✓ ✓	Withdrawal
Current /	Application Status Streed Baggley, Chri Cadilia, Celé Dah, Nashkab Eagle, Ruby	Gender Male Female Female Female Male	21/08/2013 07/05/2013 30/06/2013 20/03/2013	Accepted Accepted Accepted Offered Accepted	· · · · · · · · · · · · · · · · · · ·	✓ ✓ ✓	Withdrawal

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- 4. If you wish to accept applicants with a status of **Applied**, select **Applied** from the **Current Application Status** drop-down list and follow this same process.
- 5. Once complete, click the **Save** button to save the changes. The **Application** panel refreshes its display and shows only those applicants with an application status matching that selected in the **Application Status** drop-down list. In most cases, the list is empty.



Adding Leaving Dates for Existing Staff Members in Personnel

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

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

tails	
Employment Start Date	01/09/2009
Date of Leaving	31/08/2018
Continuous Service Start Date	01/09/2009
Local Authority Start Date	01/09/2009
Previous Employer	
Next Employer	
Notes	

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

Teaching Staff	\checkmark			Teacher Num	ber	97/73452		
Teacher Category	Qualified	Teacher		 Qualified Tea 	cher Status	Grad Teacher Pr	rogram (t	rained in El
Staff Code	JAB			Employee/Payroll No.				
Employment Dates	Employr	ment Start	Leaving Date	Cont Service Start	LA Start	Previous Employer	Next	New
	01/09/2	2009	31/08/2018	01/09/2009	01/09/2009			📂 Open
	01/09/2	2000		01/09/1997	01/09/2000	St Andrews Prim		💥 Delete
	٠			m			4	
Check	Check Clearance Date			Date Cleara	e Clearance Level			New
	List 99	List 99 26/03/2006			List 99 Cleared			🔁 Open
	CRB Ch	a a la	05/09/200	2 CDD C				
	choo	IECK	03/03/200	Z CRBE	nhanced Clear	ance		💥 Delete
Contract	Status	Start Date	Post	2 CRB E		Point/Salan	y	💥 Delete
Contract			Post		em			
Contract	Status	Start Date	Post	Service T	em	Point/Salar		New
Contract	Status	Start Date	Post	Service T	em	Point/Salar		New
	Status	Start Date 01/09/2000	Post	Service T Teachers	em	Point/Salan 6.0		New Copen
	Status	Start Date 01/09/2000	Post) Teacher	Service T Teachers	em	Point/Salan 6.0		New Open Clone
Contract Service Agreement	Status	Start Date 01/09/2000	Post) Teacher	Service T Teachers	em	Point/Salan 6.0		New Open Clone New

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

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



Allocating Applicants to Registration Groups/Classes

Before allocating applicants to classes, you must have:

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



Application icon

- changed the applicant's application status (please see *Changing the* Status of Applications to Offered or Accepted on page 50) to Offered or Accepted.
- 1. Select Focus | School | Pastoral Structure | Next Academic Year Structure to display the Next Academic Year Pastoral Structure page.

The **Effective Date** defaults to the start date of the next academic year. Whilst it is possible to change this date to view information, the default date must be used in order to edit information. 2. Expand the **Pastoral Structure** until the **Registration Group** folder is visible under the required year.



3. Right-click the applicable **Registration Group** folder and select **Members** from the pop-up menu to display the **Allocate Students/Applicants** dialog.

The **Name**, **Gender**, current **Year Group** and current **Reg Group** are displayed for each applicant together with the total number of applicants allocated to each class (at the bottom of the grid). Right-click any column heading to change the order.

 From effective udent Status Students 			dennie year (Over the whole academic year (04/09/2018 - 03/09/2019)
	_					
ED Students		Accepted	Applications			Current Applications (Applied / Offered / Reserved)
	L.	Accepted	нррпсацона			Current Applications (Applica / Onered / Neserveu)
lembers						Print 🖏 Actions 👻
Name	Gender	Year Group	Reg Group	РМ	АМ	
Abhra, Abjit	Male	Year N2	АМ		\checkmark	
Abhra, Alisha	Female	Year N2	PM	\checkmark		=
Abhra, Neel	Male	Year N2	PM	\checkmark		
Ackton, Stan	Male	Year N2	AM		✓	
Beiber, Justin	Male	Year N2	AM		✓	
Berkley, Jack	Male	Year N2	PM	\checkmark		
Del Sonno, Nadia	Female	Year N2	AM		✓	
DiCalvi, Pasquale	Male	Year N2	AM		✓	
DiMichele, Sara	Female	Year N2	PM	\checkmark		
Ebi, Danesh	Male	Year N2	PM	\checkmark		
Enlai, Cheng	Male	Year N2	PM	\checkmark		· ·
Total				10	10	
•						4
						OK Cancel

The **Student Status** section enables you to limit the applicants displayed in the grid, as follows:

- Students select this check box to display any on-roll pupil/students who have been assigned to any class within the selected year. These pupil/students are displayed with a grey background.
- Accepted Applications select this check box to display any applicants who have an application status of Accepted (i.e. they have accepted a place at your school). These applicants are displayed with a pink background.

 Current Applications – select this check box to display any applicants who have an application status of Offered (i.e. they have been offered a place at your school). These applicants are displayed with an orange background.

NOTE: Although you can specify which class the applicants will go in, the applicants must be admitted (via **Routines | Admission | Admit Applications**) before they become a member of this class.

Additional columns (House, Ethnicity, Previous School, Admission no. and Date of Birth) can also be displayed on the grid by selecting the appropriate option from the Actions drop-down menu.

ffective Date Range From effection		end of the aca	demic vear (0	Over the whole academic year (04/09/2018 - 03/09/2019)		
tudent Status			aonio your (
Students	5	Accepted /	Applications			Current Applications (Applied / Offered / Reserved)		
an Students		- Accepted /	Applications		LEL I	current Applications (Applied / Onlered / Neserved)		
lembers						Print	1	Actions 🔹
							~	Gender
Name	Gender	Year Group	Reg Group	PM	AM		~	Year
Abhra, Abjit	Male	Year N2	AM		\checkmark		~	Reg
Abhra, Alisha	Female	Year N2	PM	✓				House
Abhra, Neel	Male	Year N2	PM	✓				Ethnicity
Ackton, Stan	Male	Year N2	AM		\checkmark			Previous Schoo
Beiber, Justin	Male	Year N2	AM		\checkmark			Admission no.
Berkley, Jack	Male	Year N2	PM	✓				Date of Birth
Del Sonno, Nadia	Female	Year N2	AM		\checkmark		•	View Single
DiCalvi, Pasquale	Male	Year N2	AM		\checkmark			View Triple
DiMichele, Sara	Female	Year N2	PM	✓				view inpie
Ebi, Danesh	Male	Year N2	PM	✓				
Enlai, Cheng	Male	Year N2	PM	✓				*
Total				10	10			
•				_		III		•
							ОК	Cancel

The previous graphic shows that **Date of Birth** has been added to the grid. It can also be useful to change the view to **View Triple**, which displays a breakdown of totals for females and males in each group.

- 4. Select the required class for each applicant in the grid by clicking the appropriate cell to display a tick. Clicking the cell again removes the tick.
- 5. Once you have selected classes for each the applicants, click the **OK** button to save the changes.



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

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

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

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

- 1. Select **Reports | Run Report** to display the **Report** browser.
- 2. Expand the **Student** focus and double-click the required pre-defined report, e.g. **Registration Groups (Dated)** to display the **Enter parameter values for report** dialog.

Enter parameter values for report		
Supply Effective date	04/09/2018	
Select Year Group(s)	Select All Year N1 Clear All Year N2 Clear All Year R Year 1 Year 2	Ē
Select Registration Group(s)	Select All N1 AM Clear All PM Show All ELM	•
		OK Cancel

- 3. Deselect the **Bypass effective date** check box.
- 4. Enter the required date, e.g. 04/09/2018 or click the **Calendar** button and select the required date.
- 5. Select the required **Year Group(s)** and **Registration Group(s)** then click the **OK** button to produce the required report.

Registration Groups (Dated) Report

Room: n/a Effective date: 04/09/2	E Turnball 2018	
Name	Gender	Date of Birth
Abdullah Tamwar	М	12-01-2010
Abhra Abjit	М	20-11-2009
Abhra Alisha	F	20-11-2009
Berkley Jack	М	22-11-2009
Beynon Harvey	М	15-02-2010
Carter Danielle	F	04-04-2010
Cassidy Michael	М	02-01-2010
Cedric-Smith Lucie	F	08-05-2010
Ciprio Alicia	F	24-05-2010
Clarke Matthew	M	16-01-2010
Danes Tilly	F	22-01-2010
Davies Katherine	F	02-12-2009
3hio Imhan	М	04-04-2010
Harvey Georgia	F	09-12-2009
ones Robin	М	26-04-2010
Mitchell Laura	F	26-03-2010
Ricci Antonio	М	27-07-2010
Williams Eloise	F	04-11-2009
Fotal: Males 9 Fotal: Females 9		

Registration Group (Dated – DOB Sort)

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

Registration Group (Dated – Gender Sort)

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

Registration Group (Dated – With Columns)

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

Completed

02 Processes to be Carried Out in Other SIMS Modules

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In SIMS Attendance - Entering Reasons for Absence Last Year

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

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

防 Edit Marks	Dpen 📥 Print 🗔 Browse 🗣 Next 🏫 Previous	🕘 Links 👻 🕲 Help 💥 Close
Week Beginning	05/03/2018	Group Type Reg Group 👻
Include acc	epted applicants	
Treat as on	e group	
Short Name	Description	
N1 AM	N1 AM	=
N1 PM	N1 PM	
PM	PM	
	AM	
AM	7.04	
AM ELM	ELM	

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

Edit Session Mark	s - W/b 05/	03/20	18 - N	11 AM								
💾 Save 🏻 🄄 Undo	📥 Print 🤇	Re	fresh	\$	Code	s 😚	Pres	erve	🛃 N	linute	es Lat	te 📄 Comments 🚏 Vertical 碞 Link 🐵 Help 🚰 Unpin 💥 Close
Previous Week 🛙	Next Wee	ek 🛛	Selec	t All		Shov	v only	stud	ents \	with L	Jnexp	plained Absences today
Attendance	Dinner Reg	gister										
	on /03	Tue 06/03		Wed 07/03		Thu 08/03		Fri 09/03				
Name	Reg	АМ	PM	АМ	РМ	АМ	РМ	АМ	PM	АМ	РМ	
Clark, Felicity	N1 AM	1	х	1	х	1	х	1	х	1	х	
Hollins, Bridget	N1 AM	1	х	1	х	1	х	1	х	1	х	
Sauzo, Amiaz	N1 AM	1	х	1	х	1	х	1	х	1	х	·
Sonin, Marku	N1 AM	1	х	1	x	1	x	1	х	1	x	1

Completed

Academic Management (Primary Curriculum) End of Year Processes

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

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

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

Dinner Money

There are no end of year processes in Dinner Money. However, the following activities should be carried out:

- It is advisable to reconcile pupil/student and staff balances, issue refunds or collect debts (where possible) before the end of term, particularly for any pupil/students or staff who are leaving the school.
- Any meal price changes should ideally be entered at the start of the academic year, as additional processing will be necessary to remove recorded meals and add price changes retrospectively. These can be entered via Tools | Dinner Money | Pupil Meal Definitions/Staff Meal Definitions/Adhoc Meal Definitions and/or Other Sales Definitions.
- Print the final catering return on the last day of term.
- Where appropriate, send the debt and credit reports (produced via Reports | Dinner Money | Finance | Pupil Balances or Staff Balances) to the caterers.
- Prior to the start of the new catering year, a new catering year should be created via **Tools | Dinner Money | Setup**, corresponding to the start of the new catering year.

NOTES: The new academic year should be created first. You will then need to close and re-open SIMS before adding the new catering year.

The catering year may not correspond with the academic year.

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

Meal Charges Mapping

Tools | Dinner Money | Setup

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

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

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

02| Processes to be Carried Out in Other SIMS Modules

To prevent this issue occurring, you must either:

- Create new meal definitions for the new classes, adding the meal price (with a start date before the start of term) and selecting all the new classes. This will need to be done for all active meal types, including Absent, Other School, etc. The disadvantage of this is that in future schools will need to add price changes to both meal definitions, to cover all classes.
 - or
- Give all current meal charges an end date in the existing meal definitions, e.g. 31/08/2018. Enter a new meal definitions, with meal charges having a start date of, e.g. 01/09/2018 and select all classes listed. You can carry on using the existing meal types, as long as the charge dates do not overlap in the meal definitions. Then append the name of the old meal definitions to include, e.g. 'Inactive'.

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

If the new year has already started and schools have recorded meals, you can create temporary meal types and definitions for the new classes and use these to re-record the meals for the affected dates. Give all current meal charges an end date in the existing meal definitions, e.g. 31/08/2018. Enter a new meal definitions, with meal charges having a start date of, e.g. 01/09/2018 and select all classes listed. You can carry on using the existing meal types, as long as the charge dates do not overlap in the meal definitions. Then append the name of the old meal definitions to include, e.g. 'Inactive'.

After the New Academic Year has Started

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

- In SIMS, admit applicants (please see *Admitting Applicants* on page 64).
- In SIMS, record any re-admission pupil/students (please see Re-Admitting Pupil/Students on page 67).
- In Attendance, print the official register for July (please see *In SIMS Attendance Printing the Official Register for July* on page 68).
- In Attendance, use the Part-Time Pupil/Students routine to add Not Required codes (please see *In SIMS Attendance Using the Part-Time Pupil/Students Routine to Add Not Required Codes* on page 69).

Admitting Applicants

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

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

For more detailed instructions, please refer to the appropriate *Admissions* handbook.

1. Select Routines | Admission | Admit Applications to display the Find Intake Group browser.

∲ Find Intake Group New ∰ Search 📂 Open 💥 De	lete 📥 Print 🛛 🐺 Browse 🖣	Next 🏫 Prev	ous			
Name	Admis	sion Season 🎣	uny>	✓ Status	Active	•
Admission Year	✓ Year G	àroup 🎣	ny>	▼		
Name	Admission Year	Admission Sea	ason Year Group		Planned Admission	Status
2017/2018 - Autumn Year N2	2017/2018	Autumn	Year N2		12	Active
2017/2018 - Autumn Year R	2017/2018	Autumn	Year R		40	Active
2017/2018 - Autumn Year N1	2017/2018	Autumo	Year N1		8	Active

2. Search for and then double-click the required intake group to display the **Admit Applicant Detail** page.

The **Summary** panel displays read-only statistics about the selected intake group as shown in the following graphic.

Summary			
Total Applicants	7	Accepted	5
Planned Admission	20	Withdrawn	1
Applied	0	Rejected	0
Offered	0	Admitted	1

Total Applicants	The number of applicants who have applied for a place in this intake group.
Planned Admission	The original number of new applicants intended for this intake group.
Applied	The number of applicants who have applied for places in this intake group.
Offered	The number of applicants offered places in this intake group.
Accepted	The number of applicants who have accepted places in this intake group.
Withdrawn	The number of applicants who have withdrawn their application.
Rejected	The number of rejected applications in this intake group (Independent schools only).

The **Applications** panel displays by default, all applicants with an application status of **Accepted**. The display includes the **Name**, **Gender**, **Date of Birth**, proposed **Date of Admission**, **Enrolment Status**, **Application Status**, **UPN** and whether a UPN will be assigned. A tick grid is provided, enabling the application status to be amended as required. The order of the display can be changed by clicking any column heading.

Female Male Female Female	Date Of Bith 12/12/2012 19/04/2013 26/01/2013	Date Of Admission 01/03/2018 01/09/2018	Enrollment Status Single Registration	Application Status	UPN	Assign UPN	Admitted	Withdrawal	Enquired
Male Female Female	19/04/2013								
Female Female		01/00/2010							
Female	26/01/2012		Single Registration	Accepted		No Change			
		01/09/2018	Single Registration	Accepted		No Change			
	04/09/2012	01/09/2018	Single Registration	Accepted		No Change			
Female	05/11/2012	01/09/2018	Single Registration	Accepted		No Change			

- 3. If you wish to admit applicants with a different application status (such as **Offered**) select it from the **Application Status** drop-down list then follow the remainder of this process.
- If you need to add UPNs, click the Assign Permanent UPN button. The Assign UPN column is then populated with Assign Permanent UPN, as shown in the following graphic.

Name	Gender	Date Of Birth	Date Of Admission	Enrollment Status	Application Status	UPN	Assign UPN	Admitted	Withdrawal	Enquired
Ogden, Rachel							Assign Perman 💌			
Tate, Alexander	Male	19/04/2013	01/09/2018	Single Registration	Accepted		Assign Permanent			
Thomson, Olivia	Female	26/01/2013	01/09/2018	Single Registration	Accepted		Assign Permanent			
Waters, Ashlie	Female	04/09/2012	01/09/2018	Single Registration	Accepted		Assign Permanent			
Williams, Ruth	Female	05/11/2012	01/09/2018	Single Registration	Accepted		Assign Permanent			

5. To edit individual applicants, select the required value from the drop-down list in the **Assign UPN** column, e.g. **No Change** (if the applicant already has a UPN) or **Assign Temporary UPN**, as shown in the following graphic.

Name	Gender	Date Of Birth	Date Of Admission	Enrollment Status	Application Status	UPN	Assign UPN	Admitted	Withdrawal	Enquirec
Ogden, Rachel							Assign Permanent			
Tate, Alexander	Male	19/04/2013	01/09/2018	Single Registration	Accepted		Assign Permanent			
Thomson, Olivia	Female	26/01/2013	01/09/2018	Single Registration	Accepted		No Change			
Waters, Ashlie	Female	04/09/2012	01/09/2018	Single Registration	Accepted		Assign Permanent			
I Williams, Ruth	Female	05/11/2012	01/09/2018	Single Registration	Accepted		Assign Tempor ⊻			
			No Change Assign Permanent UP Assign Temporary UP							

- Permanent UPNs are issued to new applicants 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 an applicant only when a school does not know their permanent UPN (e.g. the school is awaiting a transfer file or awaiting an applicant's information).

IMPORTANT NOTE: UPN information is required for School Census. This is the only opportunity to bulk allocate UPNs. If you do not generate them here, you need to allocate UPNs on an individual basis via the **Pupil** (or **Student**) **Details** page. Any known existing UPNs can be entered in the **Basic Details** panel by clicking the **Application** icon on the toolbar or by selecting **Focus | Admission | Applicant**.



Application icon

6. If you intend to admit all the applicants in the selected intake group, click the **Admit All** button. Alternatively, click in the **Admitted** column adjacent to each applicant you wish to admit. The most effective method is to click the **Admit All** button and edit any exceptions.

Name	Gender	Date Of Birth	Date Of Admission	Enrollment Status	Application Status	UPN	Assign UPN	Admitted	Withdrawal	Enquired
Ogden, Rachel									✓	
Tate, Alexander	Male	19/04/2013	01/09/2018	Single Registration	Accepted		Assign Permanent	✓		
Thomson, Olivia	Female	26/01/2013	01/09/2018	Single Registration	Accepted		Assign Permanent	1		
Waters, Ashlie	Female	04/09/2012	01/09/2018	Single Registration	Accepted		Assign Permanent	✓		
Williams, Ruth	Female	05/11/2012	01/09/2018	Single Registration	Accepted		Assign Permanent	✓		

7. Once complete, click the **Save** button to admit the applicants. The **Application** panel refreshes its display and shows only those applicants with an application status matching that selected in the **Application Status** drop-down list. In most cases, the list is empty.



Re-Admitting Pupil/Students

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

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

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

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

- 1. Select Focus | Pupil (or Student) | Pupil (or Student) Details to display the Pupil (or Student) Details page.
- 2. Click the **New** button to display the **Add Student** page.
- 3. Enter the pupil/student's known details into the **Basic Details** panel then click the **Continue** button. A list of **Matched People** matching the search criteria entered is displayed.
- 4. Highlight the required pupil/student and click the **Open** button to display a warning message **The selected pupil/student is a Leaver, do you want to re-admit the Pupil/student?.**
- 5. If you are certain that this is the pupil/student who should be re-admitted, click the **Yes** button to display the pupil/student's details.
- 6. Add/edit further details as required, then click the **Save** button. All mandatory fields are highlighted in red and must be completed before you are able to finally save the pupil/student's details.
- 7. Click the **Save** button again if any additional data has been added.

Completed

In SIMS Attendance - Printing the Official Register for July

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

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

Search 📥 F	Print	😨 Help 💥 Clos		
From 01/09/2	2017 🔂 to 08/07/2018 🔂	Group Type Reg Group		
Title Official Register		☑ Show Totals ☑ Show Key to Codes		
hort Name	Description			
I1 AM	N1 AM			
11 PM	N1 PM			
M	PM			
M	AM			
LM	ELM			
INE	PINE			
SH	ASH			
AK	OAK			
JB	2JB			
GH	2GH			
то	3TO			
СВ	3CB			
ES	4ES			
SL	4SL			
BB	5BB			
DT	5DT			

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



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

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

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

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

	Pupils									
M Search 🔀	Preserve 💾 Apply								🕗 Help	💢 Close
From w/b 04/	'09/2018 🔂 to v	v/b 31/12/201	8					Group Type	Part Time Group	-
Short Name	Description									
AM	AM only									
PM	PM only									
Select All	Deselect All									
COROCIAI										
	Required' codes									
Enter 'Not	Required codes	in mornings onl	v	C) Attendance	e required al	day			
Enter 'Not			-			e required al eekly pattern		ired codes		
Enter 'Not	Attendance required	in afternoons or	-					ired codes Fri PM		
Enter 'Not) Attendance required) Attendance required	in afternoons or	nly	C) Apply a we	ekly pattern	of Not Requ			
Enter 'Not	Attendance required Attendance required Mon PM Tue AN	in afternoons or 1 Tue PM	nly Wed AM	Wed PM) Apply a we	ekly pattern Thu PM	of Not Requ	Fri PM		
Enter 'Not	Attendance required Attendance required Mon PM Tue AN	in afternoons or 1 Tue PM	nly Wed AM	Wed PM) Apply a we	ekly pattern Thu PM	of Not Requ	Fri PM		
Enter 'Not	Attendance required Attendance required Mon PM Tue AN	in afternoons or 1 Tue PM	nly Wed AM	Wed PM) Apply a we	ekly pattern Thu PM	of Not Requ	Fri PM		

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

02| Processes to be Carried Out in Other SIMS Modules

4. Specify when attendance is required by selecting one of the radio buttons.

Enter 'Not Required' codes					
 Attendance required in mornings only 	 Attendance required all day 				
Attendance required in afternoons only	Apply a weekly pattern of Not Required codes				

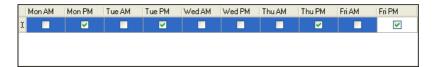
- Attendance required in mornings only
- Attendance required in afternoons only
- Attendance required all day

Select this option when a part-time pupil/student starts full-time school. All 'Not Required' codes for the pupil/student are removed from the system.

Apply a weekly pattern of Not Required codes

Select this option if a mixture of AM and PM sessions is required. The associated grid is then enabled. Select the check boxes that represent the sessions when the pupil/students are not required to attend school.

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



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

Preserve Preserve toggle button

Overwrite Overwrite toggle button

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

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

Running Housekeeping Routines in SIMS

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

Importing the Key Stage Wizard

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

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

sims Open					×
Look in:	Assessment I	lanager	- G 🦻	12	
Recent Places Desktop Libraries Computer Network	Av Pt Score I EAL TA Aspe En KS1 Temp En KS1 Temp En KS1 Temp En KS2 Temp En KS2 Temp En KS2 Temp ExFS Baselin EVFS Profile EVFS Profile	Mapping Tool Primary.xm Talc Templates AM7.xml cts.xml lates 2016.xml lates 2017.xml lates 2016.xml lates 2016.xml lates 2017.xml lates 2018.xml e Assessment Template C e Assessment Template C e Assessment Template Ef e Assessment Template Ef e Assessment Template Ef e Assessment Template Ef e Assessment Template I e Assessment Template N e Assessment Template N Emplate 2016.xml Template 2017.xml	EM 2016.xml EM 2017.xml EM 2018.xml E 2016.xml E 2017.xml E 2018.xml IFER 2016.xml IFER 2017.xml	EVFS Profile Wizard 2018.xml Key Stage 1 Wizard England 2 Key Stage 1 Wizard England 2 Key Stage 2 Kizard England 2 Key Stage 2 Wizard England 2 Key Stage 2 Kizard England 2 Key Stage 2 Kizard England 2 Key Stage 2 Kizard Engla Ponics Screening Template Phonics Screening Template Phonics Screening Templates Engl PoS Individual Reports Engla PoS Tracking Templates Ks2 Zu Year 1 Phonics Screening Wi Year 1 Phonics Screening Wi Year 2 Phonics Screening Wi	2017.xml 2018.xml 2016.xml 2016.xml 2018.xml 2018.xml Free Text Aspects 2 Free Text Aspects 7 5 1-3 2014.xml 5 2016.xml 5 2017.xml 5 2018.xml and Primary.xml land Primary.xml land Primary.xml 2016.xml 2016.xml 2016.xml 2017.xml 2016.xml 2017.xml
	۲ III				4
	File name:	Key Stage 2 Wizard Engla	and 2018.xml	-	Open
	Files of type:	Xml files (* xml)		▼	Cancel
		Open as read-only			H.

- 3. Highlight the relevant wizard XML file, e.g. Key Stage 1 Wizard England 2018.XML, then click the Open button. The name of the selected file is displayed in the Select the file to import from field. Any header comments that were added to the file when it was created for export are displayed.
- 4. Select the **Overwrite with default values** check box if you want to update the column headings.

5. Click the **Finish** button then the **Yes** button to start the import process. This may take several minutes. An Activity Log is displayed when the import is complete. Click the **Close** button.

SIMS Learning Gateway

This section applies only to SIMS Learning Gateway users

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

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

Archiving Attendance Marks

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

NOTE: Attendance marks cannot be edited once archived.

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

Adding/Removing Users from SIMS Online Services Products

This section applies only to users of SIMS Online Services products (e.g. SIMS Parent, SIMS Activities, etc.)

Users of SIMS Online Services can be managed on the **Manage Users** page of Product Admin (<u>http://admin.sims.co.uk</u>).

It is recommended that the following actions are taken over the summer holidays:

- Unregister staff members leaving the school
- Unregister pupil/students leaving the school
- Unregister parents of pupil/students leaving the school (<u>except</u> parents who have other children remaining in the school).

It is recommended that the following actions are taken over the summer holidays or early in the academic year:

- Invite staff members joining the school
- Invite pupil/students joining the school
- Invite parents of pupil/students joining the school (<u>except</u> parents who have other children in the school already).

NOTE: Invitations are valid for 90 days from the date they are sent out. Parents of pupil/students who are accepted applicants are able to register to use SIMS Online Services. However, they are not able to access Data Collection functionality until their child is on roll.

For more information on inviting and unregistering users, please refer to the *Setup Guide* of the relevant SIMS Online Services product.

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

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

畅 Print OM	R Registration Sheet			
🎁 Search 📥	Print		🗐 G	nks 👻 😨 Help 💥 Clos
From w/b	4/09/2018 🔂 to w/b 26/0	8/2019	Group Type	Reg Group
Include acc	cepted applicants			
Short Name	Description			
N1 AM N1 PM	N1 AM N1 PM			
PM AM	PM AM			
ELM PINE	ELM PINE			
ASH	ASH			
Select All	Deselect All			

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





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

or email us on misservicedesk@ schoolbusinessservices.co.uk