SBS
School Business Services

Applicable to 7.182 onwards

Producing the School Census Autumn 2018 Return handbook

English Primary/Middle deemed Primary Schools

SIMS helping schools inspire
Accredited Support

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01 | Introduction

Overview

This handbook provides the information needed by Primary/Middle deemed Primary schools in England to complete the School Census Autumn 2018 Return, which this year takes place on Thursday 4 October.

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

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

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

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

Additional Resources:

Preparing for the School Census Autumn 2018 Return handbook

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

Changes to the School Census Autumn Return include the following:

- Census Date: 04/10/2018
- Termly attendance collected from 02/04/2018 to 31/07/2018
- Exclusions collected from 01/01/2018 to 01/04/2018
- Free School Meals collected from 18/05/2018 to 04/10/2018

Changes to Data Items Collected

The Service Children in Education indicator is now collected for all three School Census returns and is applicable to all pupils and school phases.

The DfE no longer require the following data items to be collected for any School Census return:

- Pupil Nationality
- Pupil Country of Birth.

Alternative Provision Placement

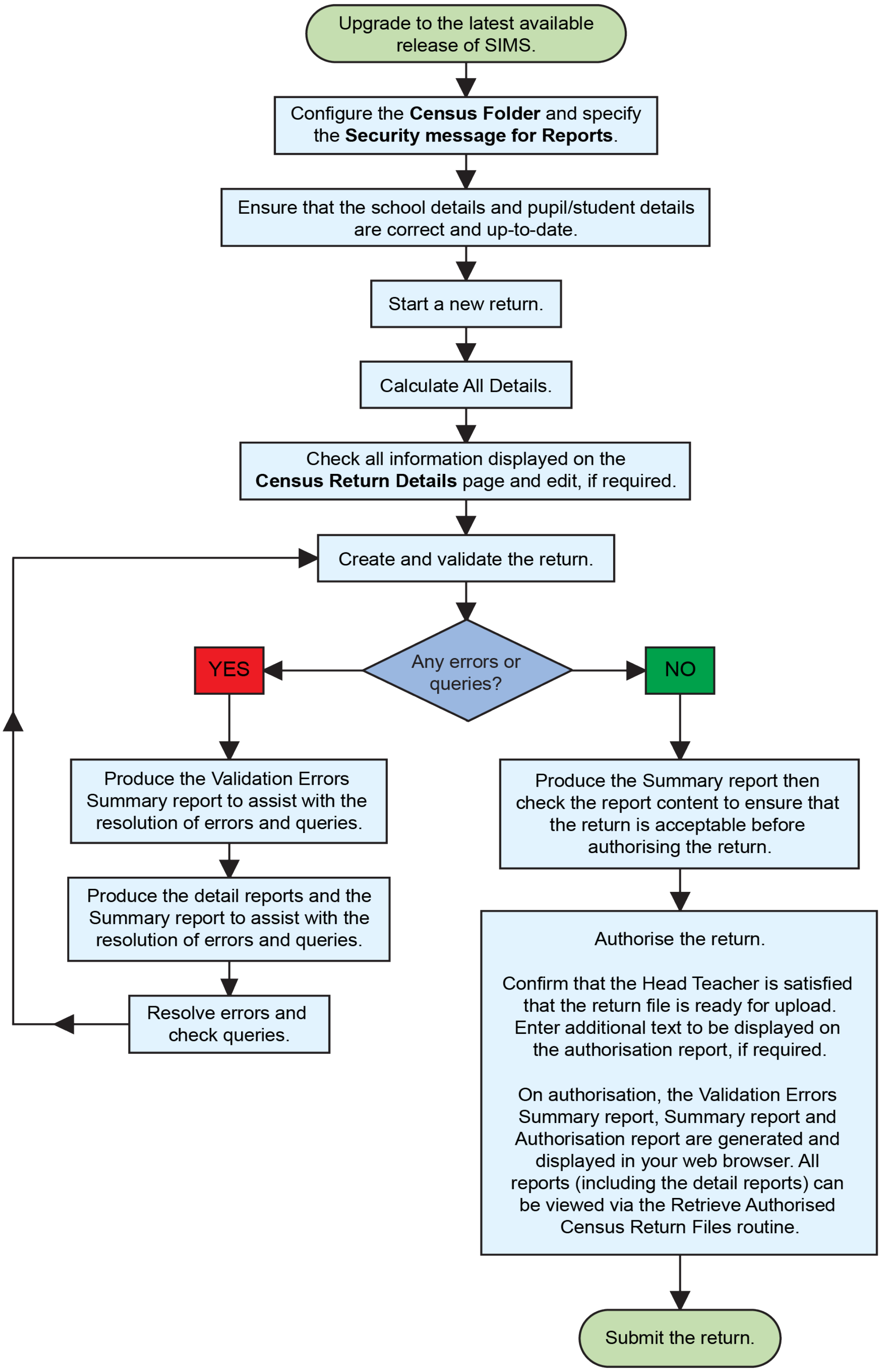
The collection date range for pupil placements in Alternative Provisions (**AP Placements**) is now displayed in the **Census Details** panel.

A new detail report (**AP Placements**) is available from the **Detail Report** drop-down list.

There is no requirement from the DfE for this data to be collected or held. Should schools decide to collect, process or retain data on Alternative Provision Placements for their own purposes, a lawful basis for this processing must be identified by the school, as outlined in GDPR articles 6 and 9. More information on lawful bases for processing can be found on the ICO website (https://ico.org.uk/for-organisations/guide-to-the-general-data-protection-regulation-gdpr/lawful-basis-for-processing/#ib3).

Steps to Producing the School Census Return

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



Where to Find More Information

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

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

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

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

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

   The search results are displayed automatically.

Tips for using the My Account Search Facility

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

NOTE: You no longer need to use + / - / "" when searching.

- Cut down on the amount of words that you type in the search field and only use key words, e.g. instead of typing `student showing as a contact` search for the word `contact`.
- Use the **Product Type** filter to refine results further.
- Use the advanced filters located on the left-hand side of the **Search results** page.

Additional Information

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

To access the School Census documents, please search for `CENSUS18` in the SIMS **Documentation Centre** or My Account.

02| Preparing for the School Census Autumn Return

Setting Permissions

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

Producing the Return

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

Editing and Preparing Data

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

- Administration Assistant
- Admissions Officer
- School Administrator.

Importing Revised Files

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

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

- Returns Manager
- System Manager.

For more information about the Import Fileset functionality, please refer to the applicable preparation guide, available via the **Documentation** button on the SIMS **Home Page** or the My Account website (https://myaccount.capita-cs.co.uk).

Where to find More Information about Permissions

Please contact your System Administrator/Manager if you are not sure whether you have the required permissions. For more information, please refer to the *Managing SIMS Users, Groups and Databases* handbook.

An Excel spreadsheet describing the numerous permissions available in SIMS is available on the My Account website (https://myaccount.capita-cs.co.uk).

To find the spreadsheet, search for `<sims version> sims permissions`, e.g. `7.182 sims permissions`.

What Version of SIMS is Required?

To run the return, you must have the SIMS 2018 Summer Release (7.182) or later installed.

To check which version of SIMS is installed, open SIMS and then select **Help | About SIMS**. A dialog similar to the one shown in the following graphic is displayed.

The version should read 7.182 or later.

Preparing Data for the School Census Return

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

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

School Level Data

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

Pupil Level Data

- Pupil Identifiers: UPN, former UPN, surname, forename, middle names, former surname, preferred surname, date of birth and gender.
- Characteristics:
  - first language
  - post looked after arrangements
  - top-up funding indicator, funded free entitlement hours, extended entitlement childcare hours, 30 hour code, disability access fund indicator and hours at setting
  - free school meal eligibility (18/05/2018 to 04/10/2018): start date, end date and UK country in which the eligibility applies

    - school dinner taken (applicable to schools with pupils in Reception, Year 1 and Year 2)
    - service children in education indicator
    - Youth Support Services Agreement (YSSA) indicator (Middle deemed Primary schools only).
- Status:
    - enrolment status, date of entry, date of leaving, part-time indicator, boarder indicator and actual national curriculum year group
    - type of class (Primary schools only).
- Special Educational Needs: SEN provision, member of SEN unit (sometimes called special class) indicator and member of resourced provision indicator.
- Home Information: pupil's home address, unique property reference number (UPRN).
- Exclusion Information (01/01/2018 to 01/04/2018): category, reason, SEN provision, start date and actual number of sessions.
- Attendance Information (02/04/2018 to 31/07/2018): possible sessions, sessions missed due to authorised absence, sessions missed due to unauthorised absence, attendance codes and number of sessions missed.

For more information and instructions on all of the preparations that need to be carried out before the census return is produced, please refer to the appropriate *Preparing for the School Census Autumn 2018* guide.

The preparation guide, together with other useful School Census documentation, is available from the SIMS **Documentation Centre** (accessed via the **Documentation** button, which is located on the top right-hand side of the SIMS **Home Page**) and on the My Account website (https://myaccount.capita-cs.co.uk).

To access the School Census documents, please search for `CENSUS18` in the SIMS **Documentation Centre** or My Account.

03| Producing the School Census Autumn Return

Creating a New School Census Return

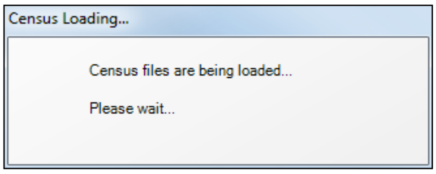
Before creating a new return, ensure that all pupil and school information is present and accurate in SIMS.

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

Data is collected for the following pupils:

- All pupils on-roll on 04/10/2018 (census day).
- Any additional pupils not on-roll on census day who:
  - were on-roll for at least one session during the collection period from 02/04/2018 to 31/07/2018.
  - had an exclusion that started between 01/01/2018 and 01/04/2018.

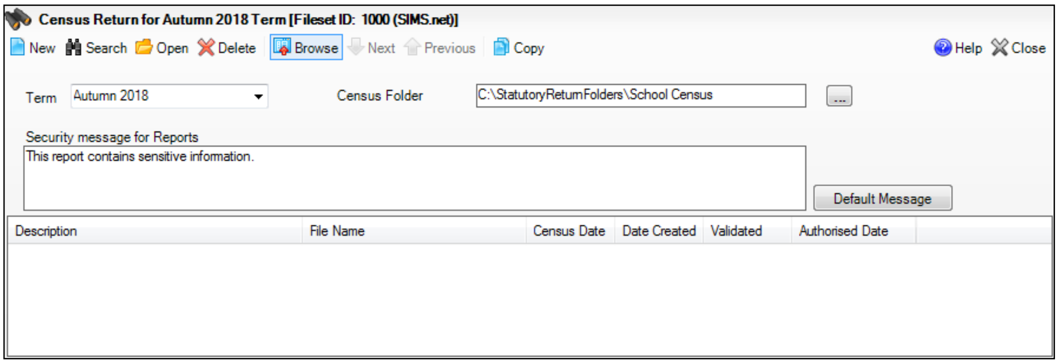
1. Select **Routines | Statutory Returns | School Census** to load the School Census validation and reporting files.



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

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

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



By default, the **Term** field displays the appropriate term for the selected return, in this instance **Autumn 2018**.

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

More Information:
Deleting an Unauthorised Return on page *56*
Specifying the Security Message for Reports on page *12*

Configuring the Census Folder

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

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

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

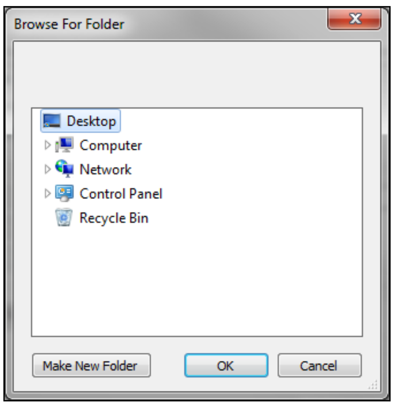
The General Data Protection Regulation (GDPR), which replaces the Data Protection Act 1998, is a directive for certain safeguards regarding the use of personal data. It is important that schools process all data (not just the data collected for the school census) in accordance with the full requirements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

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

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

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

   
   Browse button

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

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

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

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

Specifying the Security Message for Reports

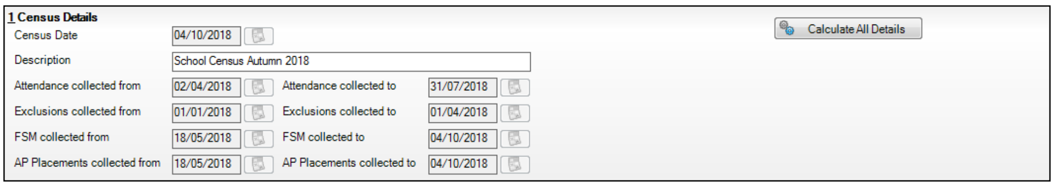
At the bottom of the browser is a **Security Message for Reports** field, which contains text that will be displayed at the top of each report.

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

Editing Census Details

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

- Census Date 04/10/2018.
- Attendance data collected from 02/04/2018 to 31/07/2018.
- Exclusions data collected from 01/01/2018 to 01/04/2018.
- FSM (Free School Meal) data collected from 18/05/2018 to 04/10/2018.
- AP (Alternative Provision) Placements: There is no requirement from the DfE for this data to be collected or held. Should schools decide to collect, process or retain data on Alternative Provision Placements for their own purposes, a lawful basis for this processing must be identified by the school, as outlined in GDPR articles 6 and 9. More information on lawful bases for processing can be found on the ICO website (https://ico.org.uk/for-organisations/guide-to-the-general-data-protection-regulation-gdpr/lawful-basis-for-processing/#ib3).



The default **Description** (**School Census Autumn 2018**) can be edited, if required, e.g. to identify a dry run.

> ***WARNING:*** *Each description used must be unique. An error message is displayed if SIMS identifies a duplicate description.*
>
> *A unique description helps to identify the required return when viewed in the* ***Census Return*** *browser and can be particularly useful when creating dry runs, or copies of existing returns.*

Calculating All Details

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

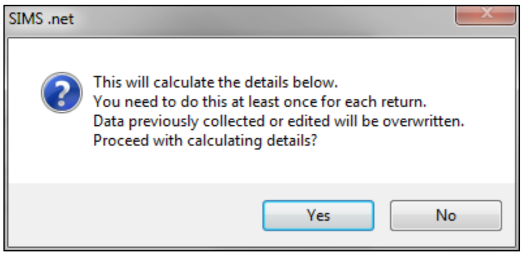
IMPORTANT NOTE: *You must calculate all details at least once to populate the various panels for each return.*

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

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

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

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



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

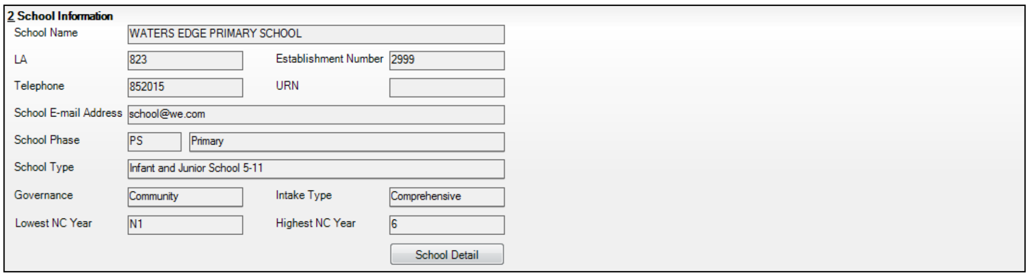
   The applicable panels on the **Census Return Details** page are populated with data.

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

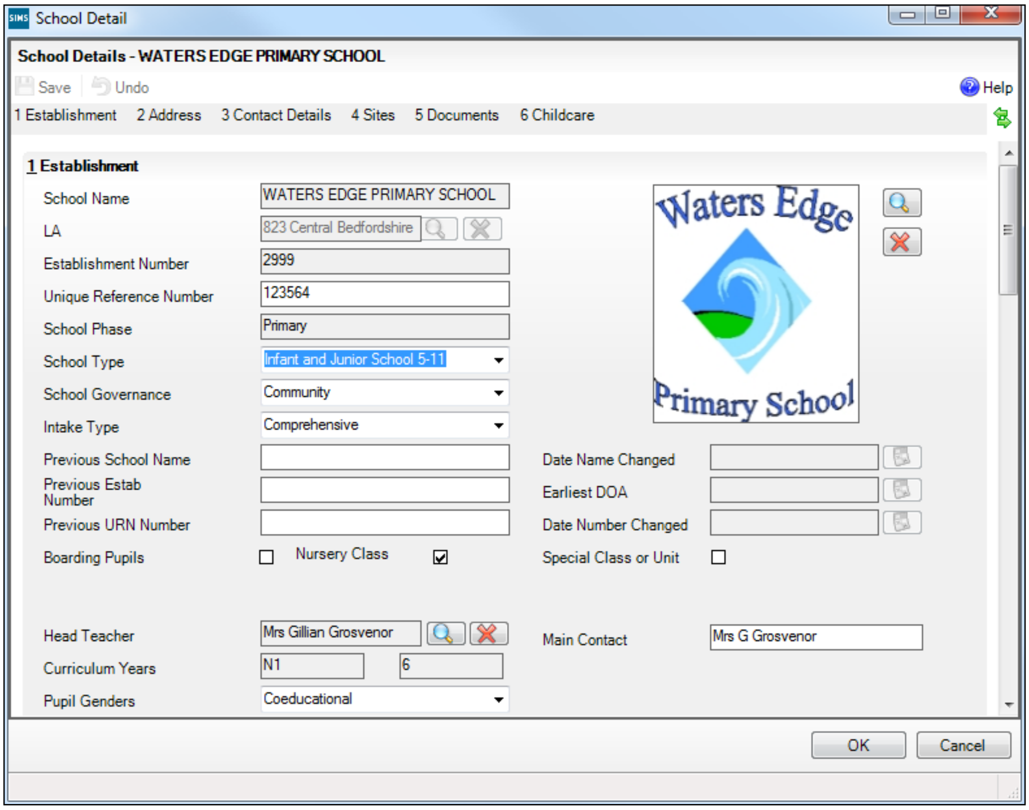
Editing School Information

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

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



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

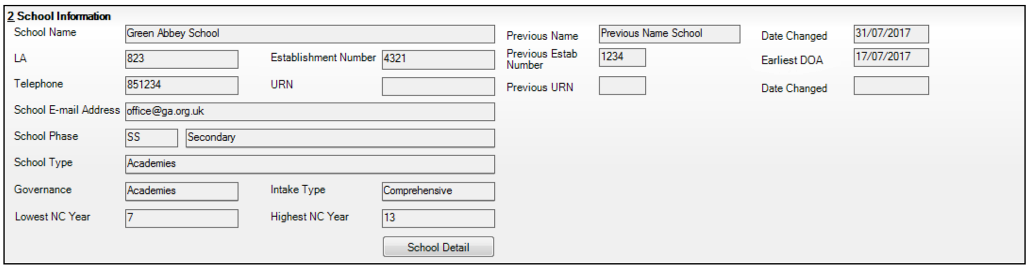


2. Add or amend the school details, selecting from the drop-down lists where applicable.

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

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

Information for Academies



Academies should also ensure that the following information is recorded, if applicable:

- The **School Type** and **School Governance**.

  Select **Academies** from the applicable drop-down lists.
- The **Previous Name** and **Date Name Changed**.
- The **Previous Estab Number** and **Earliest DOA** (date of admission).

  This information is used by School Census. If the establishment number (DfE number) has changed for sponsor-led Academies, historical information is not collected and the earliest date of admission is reported in the School Census.
- The **Previous URN Number** (used by other census returns) and **Date Number Changed**.

  This information is used by the School Workforce Census. For all types of Academies opened in the collection period, the date that the establishment's URN changed is used to determine when the academy was formed. Historical information is not collected from before the date the URN changed.

Editing Early Years

Early Years data is collected from all schools that have early years pupils on-roll on census day. The following items are collected:

- Hours at Setting
- Funded Hours
- Disability Access Fund
- 30 Hour Code
- Extended Funded Hours.

NOTE: Disability Access Fund, 30 Hour Code and Extended Funded Hours are not collected in the census for pupils aged two at 31/08/2018.

Funded Hours and Hours at Setting

Funded hours are the total number of free child care hours that a child receives. All three and four year old pupils are eligible for 15 hours funded child care a week. Advice about the eligibility of two year old children for funded child care can be found on the DfE website (https://www.gov.uk/help-with-childcare-costs/free-childcare-2-year-olds).

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

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

Date of Birth Ranges	Phase and Year Group	Free Entitlement
01/09/2014 to 31/08/2016 inclusive	All relevant schools and year groups	15 hours
01/09/2013 to 31/08/2014 inclusive	All relevant schools - National Curriculum Year groups E1, E2, N1 and N2 only.	15 hours

Disability Access Fund

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

- They are in receipt of child Disability Living Allowance (DLA)

  and
- They access their entitlement to free early learning and childcare, e.g. funded hours.

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

Date of Birth Ranges	Phase and Year Group
01/09/2014 to 31/08/2015 inclusive	All relevant schools and year groups
01/09/2013 to 31/08/2014 inclusive	All relevant schools - National Curriculum Year groups E1, E2, N1 and N2 only.

Extended Funded Hours and 30 Hour Code

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

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

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

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

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

Date of Birth Ranges	Phase and Year Group	Free Entitlement
01/09/2014 to 31/08/2016 inclusive	All relevant schools and year groups	15 hours
01/09/2013 to 31/08/2014 inclusive	All relevant schools - National Curriculum Year groups E1, E2, N1 and N2 only.	15 hours

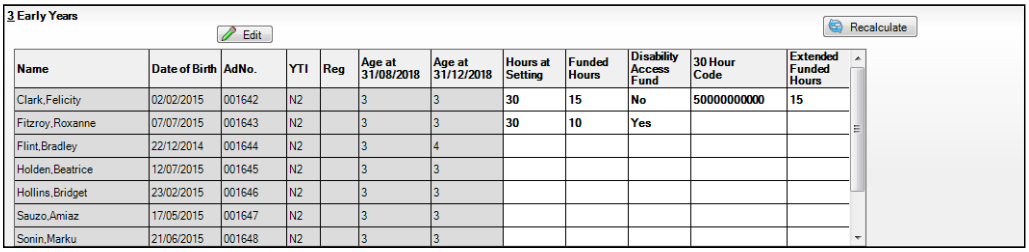
Extended Funded Hours information provided by the DfE can be found on their website (https://www.gov.uk/government/publications/30-hours-free-childcare-la-and-early-years-provider-guide).

Recording Early Years

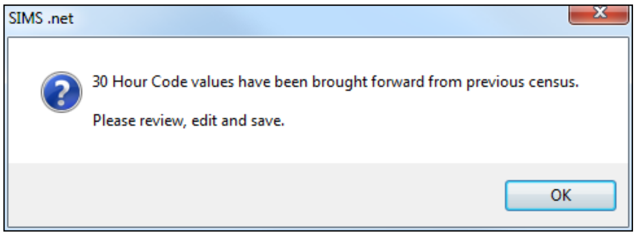
The required data can be recorded:

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

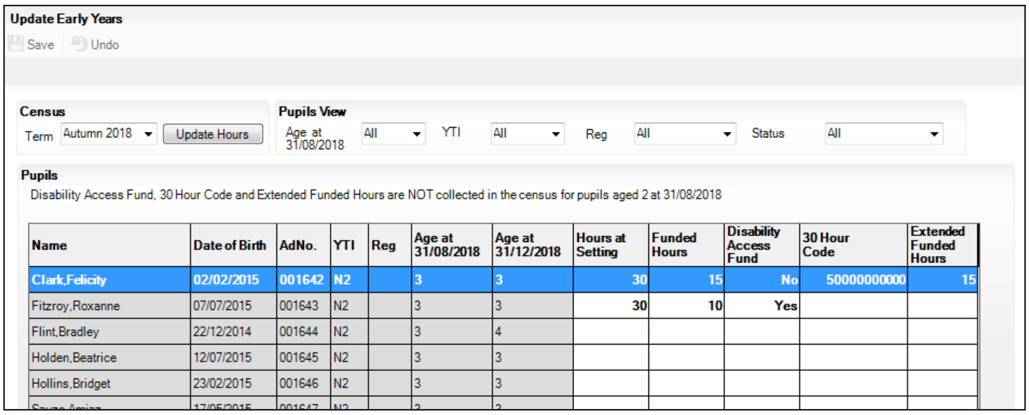
If data has been recorded previously, the values are displayed in the read-only **Early Years** panel. Only cohorts applicable to your school are displayed.



1. In the **Early Years** panel, click the **Edit** button to display a message informing you that data has been brought forward from the previous census.



2. Click the **OK** button to display the **Update Early Years** page. By default, the current term is displayed in the **Census** panel.



Primary phase schools that have defined Early Years Attendance Patterns (via **Focus | Pupil | Pupil Details**) for pupils who are receiving free nursery care can update Hours at Setting automatically.

a. Click the **Update Hours** button (applicable to Primary phase schools only).

   The number of Hours at Setting that the listed pupils are expected to attend during the census week (based on the early years provision times recorded as part of their attendance pattern) are displayed in the **Pupils** panel.

b. Edit the values, if required.

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

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

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

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

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

4. If most of the pupils are receiving the same number of hours, the following method can be used to populate the column quickly:

   a. In the **Pupils View** panel, select the required year group from the Year Taught In (**YTI**) drop-down list. The selected pupils only are displayed in the **Pupils** panel.

   b. Right-click in the **Pupils** panel, then select **Select All** from the drop-down list.

   c. Click in one of the highlighted cells of the column you wish to populate, i.e. **Hours at Setting**, **Funded Hours** or **Extended Funded Hours**, then enter the number of hours that is applicable to the majority of pupils.

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

   d. Click to the right of the grid to deselect all.

   e. Edit the entry for each pupil who is receiving a different number of hours. This is achieved by highlighting the required pupil, clicking the associated **Hours at Setting**, **Funded Hours** or **Extended Funded Hours** cell (as applicable) then entering the required number.

5. Indicate whether the pupils are in receipt of the **Disability Access Fund**. Click the applicable cell then select **Yes** or **No** from the drop-down list.

6. Enter the 11 digit **30 Hour Code**, e.g. 50000000000, in the applicable cell, if in receipt of extended funded hours.

   > ***IMPORTANT NOTE:*** *Each pupil must have a different 30 hour code. Ensure that all 11 digits are entered.*

7. Click the **Save** button.

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

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

   > ***IMPORTANT NOTES:***
   > *If, while completing the return, any of the following processes are performed, click the **Recalculate** button (located at the top right-hand side of the **Early Years** panel) to ensure that the up-to-date data is displayed:*
   > - *any information is update via **Tools | Statutory Return Tools | Update Early Years***
   > - *a new pupil is added in SIMS*
   > - *a pupil's date of birth is amended.*
   >
   > *Please note that when information is updated via the **Edit** button, the **Early Years** panel is refreshed automatically.*

More Information:
Early Years Report on page *46*

Using the Status to determine if Hours at Setting or Funded Hours are recorded

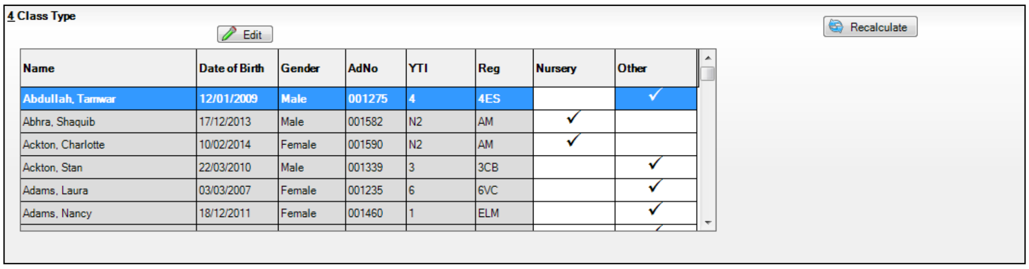
1. On the **Census Return Details** page, click the **Edit** button (located in the **Early Years** panel) to display the **Update Early Years** page.
2. In the **Pupils View** panel, ensure that the required **Age at** date, **YTI** and **Reg** group are selected and then select **No Hours at Setting**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

   Only pupils who do not have an entry for **Hours at Setting** (or **Funded Hours**) are displayed.
3. Enter the required values for these pupils as described previously.
4. Click the **Save** button.

Editing Class Types

The type of class (either **Nursery** or **Other**) that each pupil belongs to on census day must be specified. Pupils in your Nursery class should be specified as **Nursery**, with all other pupils specified as **Other**.

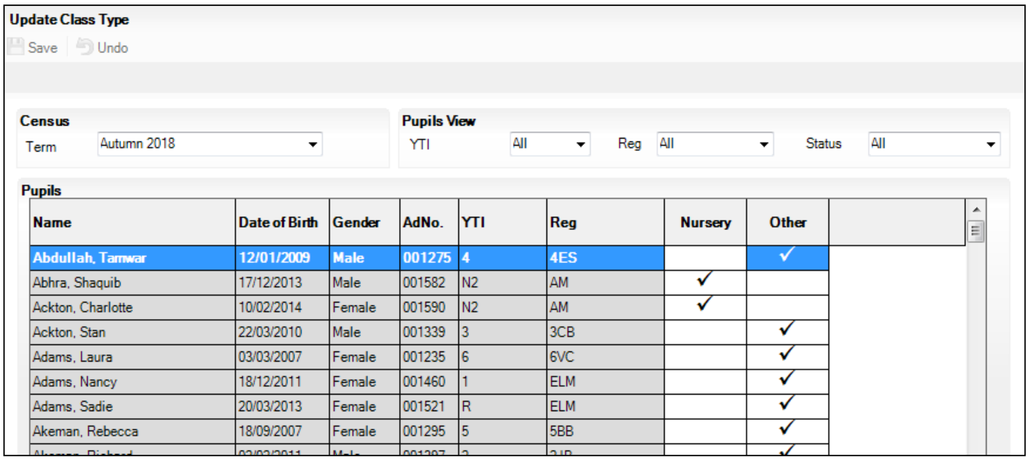
If the class types have been recorded previously via **Tools | Statutory Return Tools | Update Class Type**, the data is displayed in the **Class Type** panel.



Name	Date of Birth	Gender	AdNo	YTI	Reg	Nursery	Other
Abdullah, Tamwar	12/01/2009	Male	001275	4	4ES		✓
Abhra, Shaquib	17/12/2013	Male	001582	N2	AM	✓	
Ackton, Charlotte	10/02/2014	Female	001590	N2	AM	✓	
Ackton, Stan	22/03/2010	Male	001339	3	3CB		✓
Adams, Laura	03/03/2007	Female	001235	6	6VC		✓
Adams, Nancy	18/12/2011	Female	001460	1	ELM		✓

The **Class Type** panel is read-only. However, you can review, edit and save class types by clicking the **Edit** button.

1. Click the **Edit** button to display the **Update Class Type** dialog.

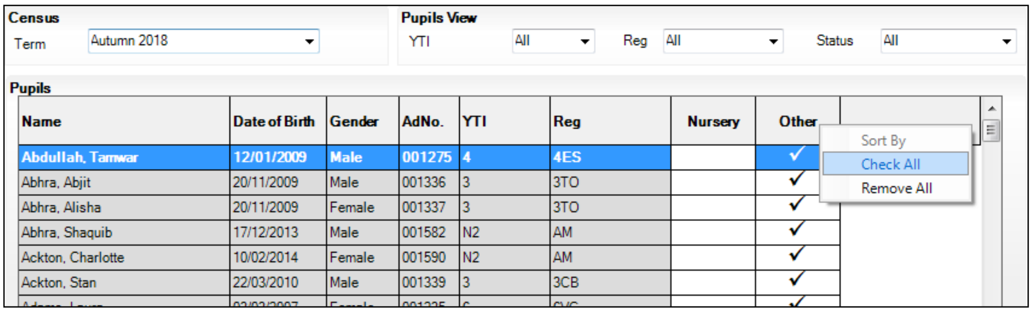


Name	Date of Birth	Gender	AdNo.	YTI	Reg	Nursery	Other
Abdullah, Tamwar	12/01/2009	Male	001275	4	4ES		✓
Abhra, Shaquib	17/12/2013	Male	001582	N2	AM	✓	
Ackton, Charlotte	10/02/2014	Female	001590	N2	AM	✓	
Ackton, Stan	22/03/2010	Male	001339	3	3CB		✓
Adams, Laura	03/03/2007	Female	001235	6	6VC		✓
Adams, Nancy	18/12/2011	Female	001460	1	ELM		✓
Adams, Sadie	20/03/2013	Female	001521	R	ELM		✓
Akeman, Rebecca	18/09/2007	Female	001295	5	5BB		✓

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

2. To specify the class type for an individual pupil, click the appropriate cell of the **Nursery** or **Other** column to display a tick. Clicking again removes the tick.

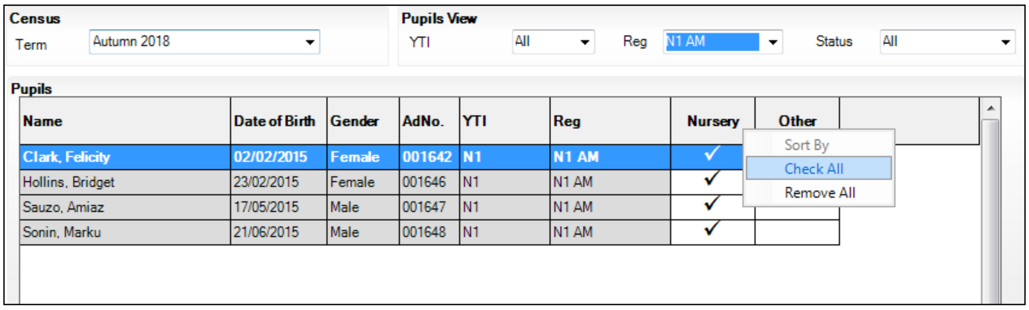
3. If all or the majority of pupils need to be assigned the same class type, the following method can be used to quickly populate the **Nursery** and **Other** columns:
   a. Right-click the **Other** column header then select **Check All** from the pop-up menu.



   b. In the **View Pupils** panel, select a Nursery year from the year taught in (**YTI**) drop-down list.

   The selected pupils only are displayed in the **Pupils** panel.

   c. Right-click the **Nursery** column header then select **Check All** from the pop-up menu.



   d. Repeat steps *b* and *c* for any additional Nursery year.
   e. To ensure that your selection is correct, select **All** from the Year Taught In (**YTI**) drop-down list, then check the data displayed.
4. Click the **Save** button.
5. If a message is displayed advising you that some pupils have not been assigned a class type, click the **No** button then ensure that a class type is allocated to every pupil before saving again.

> ***IMPORTANT NOTE:*** *To prevent validation failures when the School Census file is created, every pupil must be assigned a class type.*

6. Click the **OK** button to return to the **Census Return Details** page, where the updated class types are displayed in the **Class Type** panel.

Additional Resources:

Preparing for the School Census Autumn 2018 Return handbook

Resetting All Class Types

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

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

Identifying which Pupils have no Class Type Specified

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

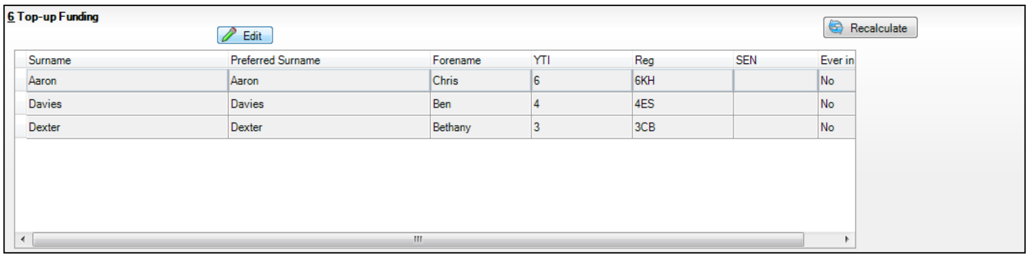
Specify a class types for these pupils, as previously described.

Editing Pupils with Top-Up Funding

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

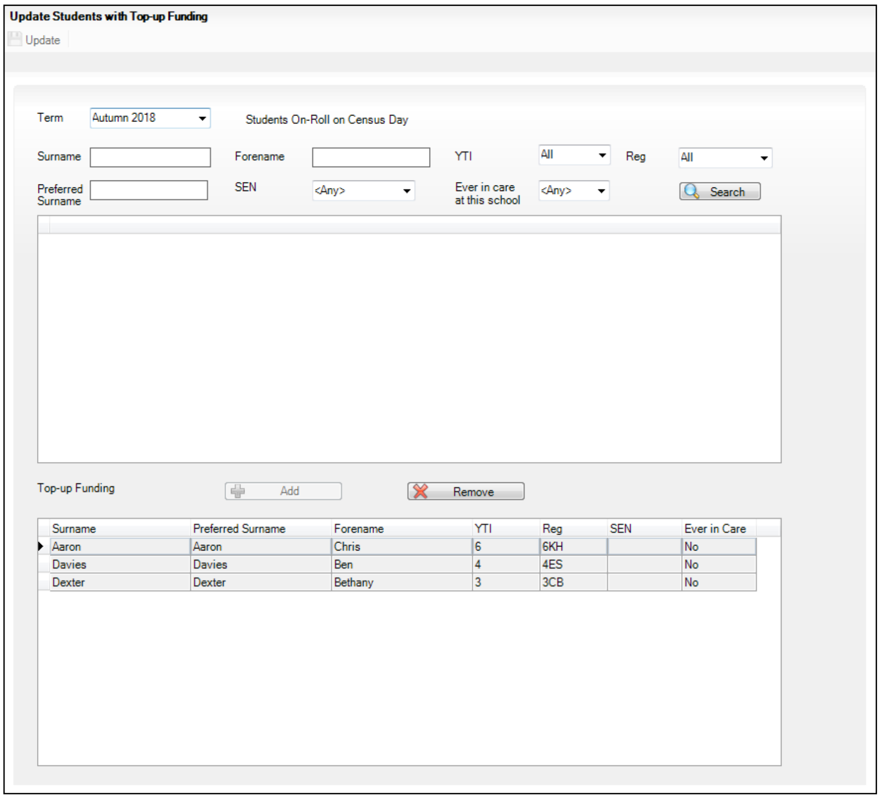
The **Top-up Funding** panel enables you to record the on-roll pupils for whom your school is receiving top-up funding on census day.

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



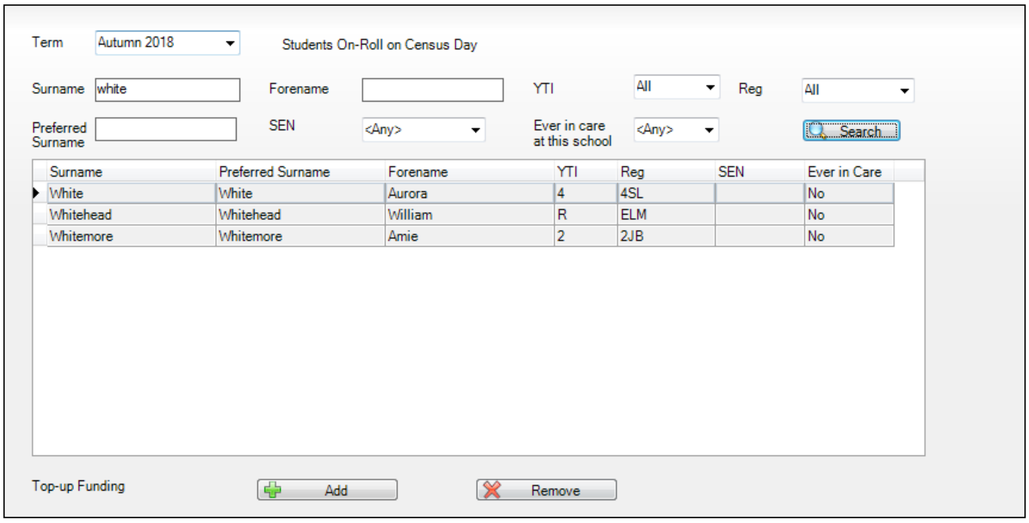
The information displayed in the **Top-up Funding** panel is read-only. Updating top-up funding information, e.g. adding or removing a pupil, must be done via the **Edit** button.

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



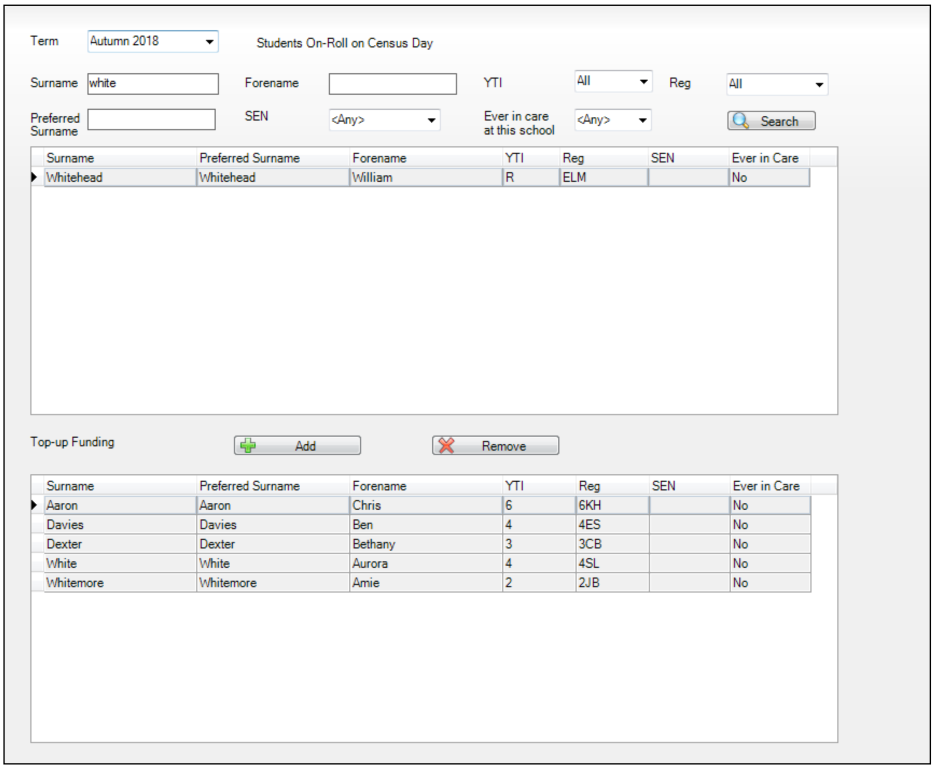
2. Use the **Students On-Roll on Census Day** search criteria to locate the additional pupils you wish to record as having top-up funding.

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



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

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



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

Additional Resources:

Preparing for the School Census Autumn 2018 Return handbook

More Information:

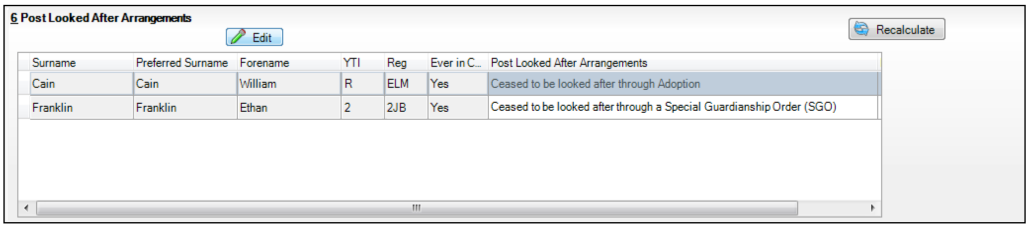
Top-up Funding Report on page *45*

Editing Pupil Post Looked After Arrangements

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

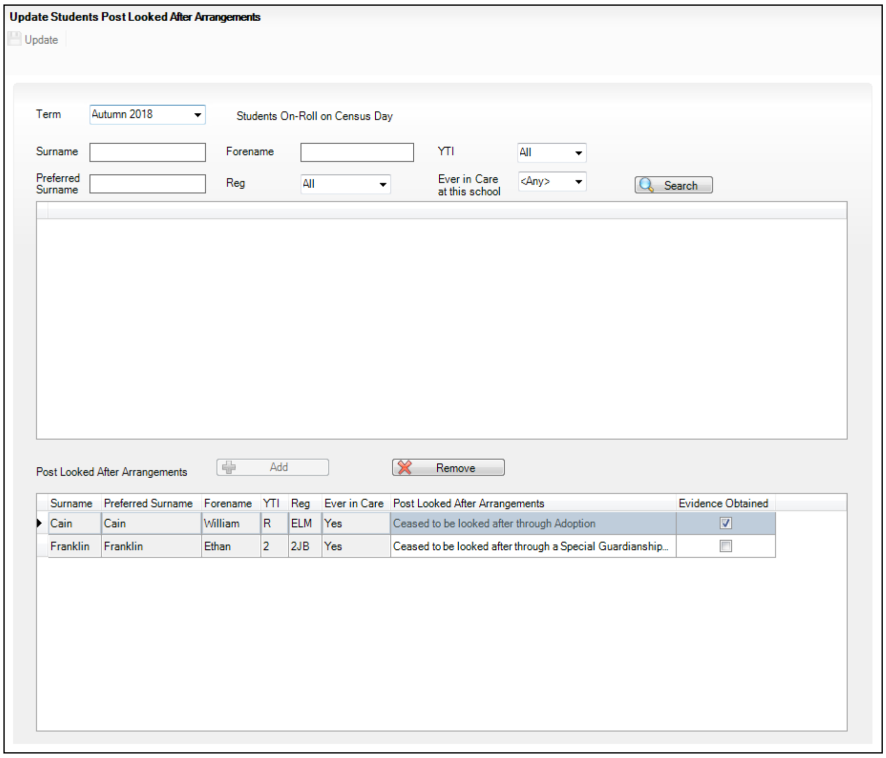
If the pupils with post looked after arrangements (PLAA) have been recorded previously via **Tools | Statutory Return Tools | Update Student Post Looked After Arrangements**, the data is displayed in the **Post Looked After Arrangements** panel.

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



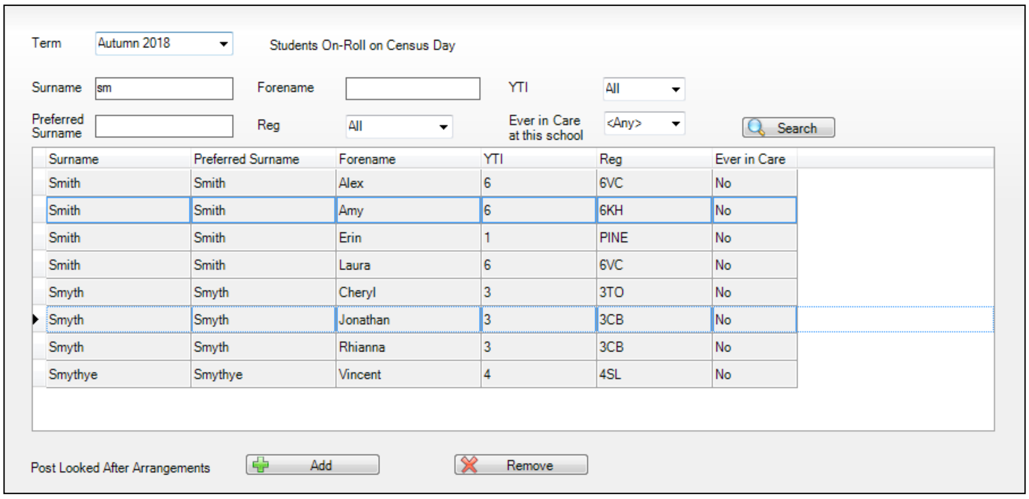
The information displayed in the **Post Looked After Arrangements** panel is read-only. Updating the information, e.g. editing the PLAA status or adding a pupil, must be done via the **Edit** button.

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



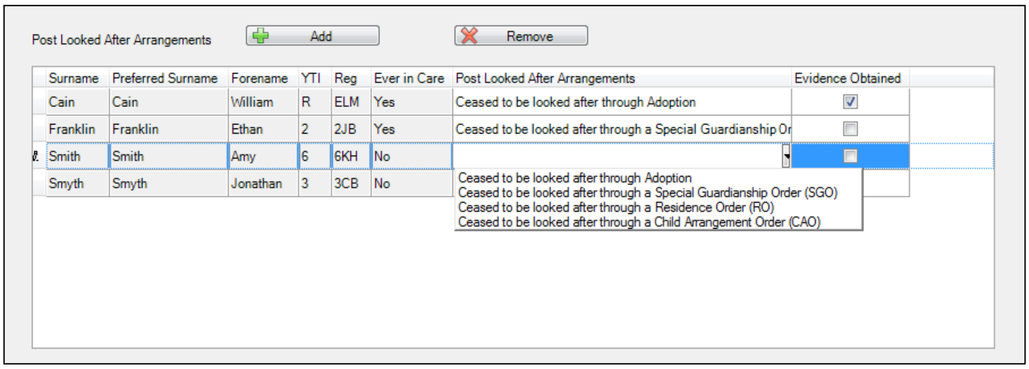
3. Use the **Students On-Roll on Census Day** search criteria to locate the additional pupils you wish to record as having PLAA.

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



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

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



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

> *NOTE: **Ceased to be looked after through a Residence Order** (**RO**) has been replaced by **Ceased to be looked after through a Child Arrangement Order** (**CAO**).*
>
> *You do not need to change any existing residence orders but new post looked after arrangements must be recorded as child arrangement orders.*

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

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

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

   If you have indicated that evidence has been obtained, you are reminded to ensure that the necessary documents are stored securely outside of SIMS or within the Document Management Server.
9. Click the **OK** button to continue.
10. Click the **OK** button (located at the bottom right-hand side of the screen) to return to the **Census Return Details** page, where the updated information is displayed in the **Post Looked After Arrangements** panel.

Additional Resources:

Preparing for the School Census Autumn 2018 Return handbook

More Information:
Post Looked After Arrangements Report on page *46*

Managing School Dinners Taken on Census Day

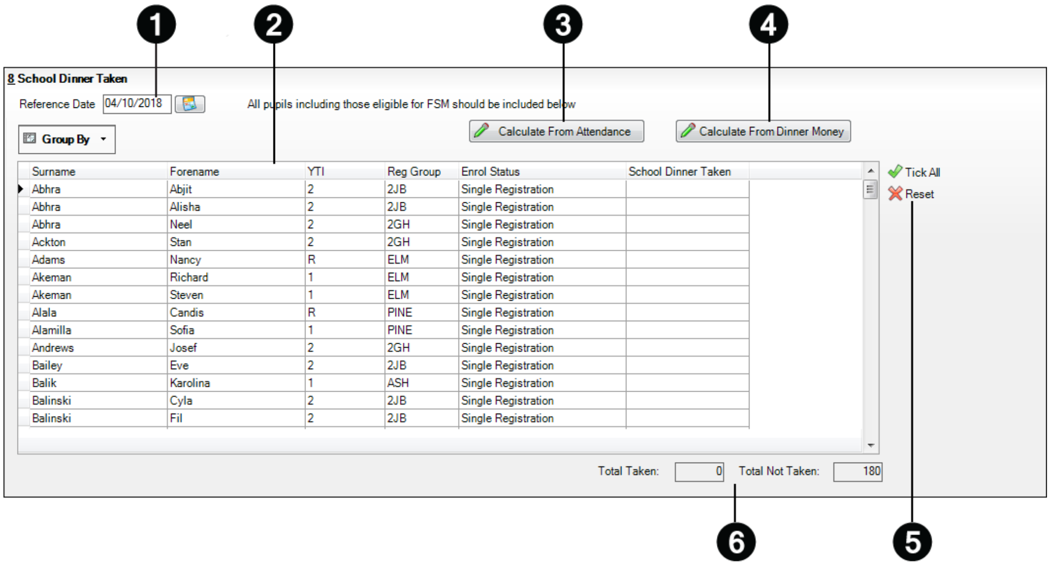
Applicable to schools with pupils in Reception, Year 1 and Year 2

All pupils in Reception, Year 1 and Year 2 in English state-funded schools are offered a Universal Infant School Meal, i.e. a hot meal at lunchtime. This applies to Academies, Free Schools and Pupil Referral Units, as well as to schools maintained by the local authority. The School Census Autumn 2018 Return collects information about pupils who receive a Universal Infant School Meal (school dinner) on census day.

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

> *NOTES: The **Reference Date** is provided so that your school can report school dinners taken on an alternative date to census day, if required.*
>
> *The pupils listed in the **School Dinner Taken** panel are those who are on-roll on census day. Whereas the data calculated via the **Calculate From Attendance** and the **Calculate From Dinner Money** buttons is based on the reference date.*

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



1	By default, the **Reference Date** is set to 04/10/2018 (census day). If, due to exceptional circumstance, e.g. flooding, pupils were unable to take a school dinner on census day, the reference date can be changed to a date that reflects the normal situation.
2	Click the required column header to sort the data.
3	The **Calculate From Attendance** button is displayed only if SIMS Attendance is in use.
4	The **Calculate from Dinner Money** button is displayed only if SIMS Dinner Money is in use.
5	When the **Reset** button is clicked all existing ticks are removed from the **School Dinner Taken** column enabling you to start the process again.
6	The **Total Taken** and **Total Not Taken** provide an indication of whether the number of school dinners taken is correct or whether edits are required.

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

More Information:
School Dinner Taken Report on page *45*

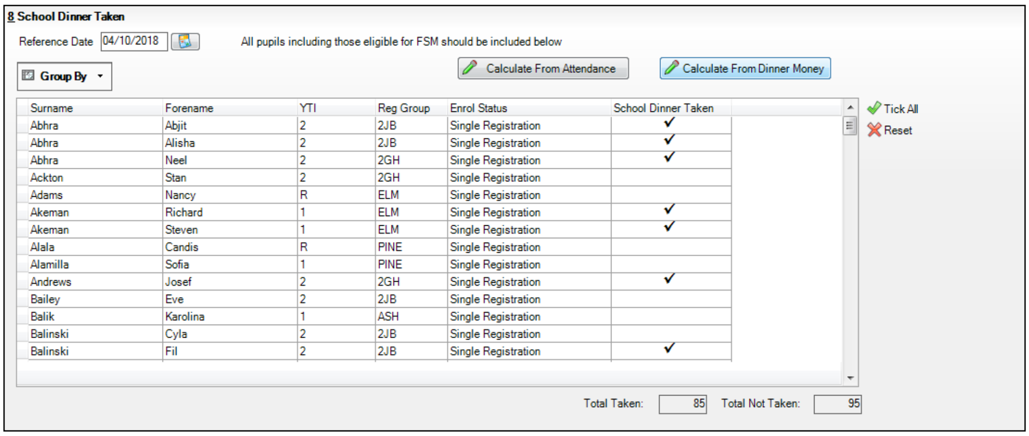
Using Dinner Money to Calculate School Dinners Taken on Census Day

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

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

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

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



Surname	Forename	YTI	Reg Group	Enrol Status	School Dinner Taken
Abhra	Abjit	2	2JB	Single Registration	✓
Abhra	Alisha	2	2JB	Single Registration	✓
Abhra	Neel	2	2GH	Single Registration	✓
Ackton	Stan	2	2GH	Single Registration	
Adams	Nancy	R	ELM	Single Registration	
Akeman	Richard	1	ELM	Single Registration	✓
Akeman	Steven	1	ELM	Single Registration	✓
Alala	Candis	R	PINE	Single Registration	
Alamilla	Sofia	1	PINE	Single Registration	
Andrews	Josef	2	2GH	Single Registration	✓
Bailey	Eve	2	2JB	Single Registration	
Balik	Karolina	1	ASH	Single Registration	
Balinski	Cyla	2	2JB	Single Registration	
Balinski	Fil	2	2JB	Single Registration	✓

1. Click the **Calculate From Dinner Money** button.

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

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

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

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

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

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

Using Attendance to Calculate School Dinners Taken on Census Day

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

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

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

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

   If missing marks exist, a message is displayed:

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

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

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

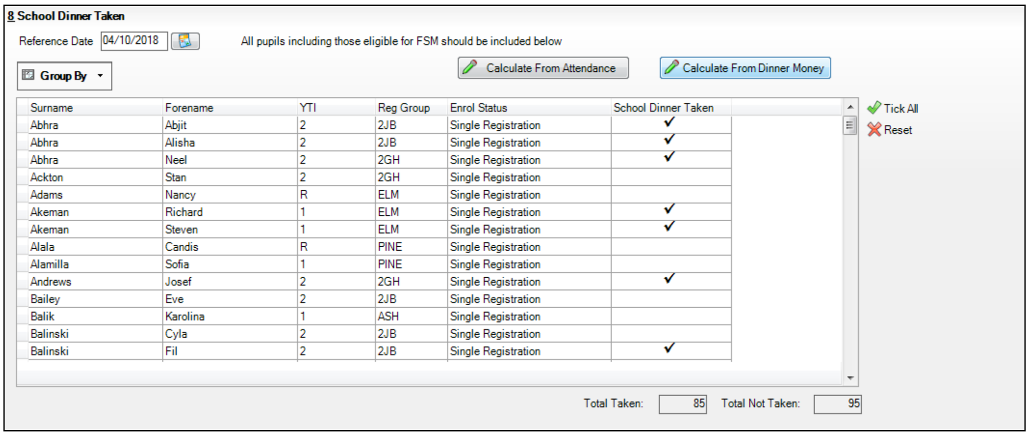
   Use the **Group By** functionality to group pupils by **Year Taught In**, **Reg Group** or **Enrolment Status**, enabling school dinners taken information to be updated from class lists, etc.

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

Using Manual Entry to Record School Dinners Taken on Census Day

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

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



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

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

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

Entering Attendance Information

Summer term attendance data (including attendance codes and the number of sessions missed) should be provided for non-boarder pupils aged four to 15 inclusive on 31/08/2017 who were on-roll for at least one session during each Summer half term, i.e. from 02/04/2018 to 27/05/2018 and 28/05/2018 to 31/07/2018.

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

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

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

SIMS Attendance Users

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

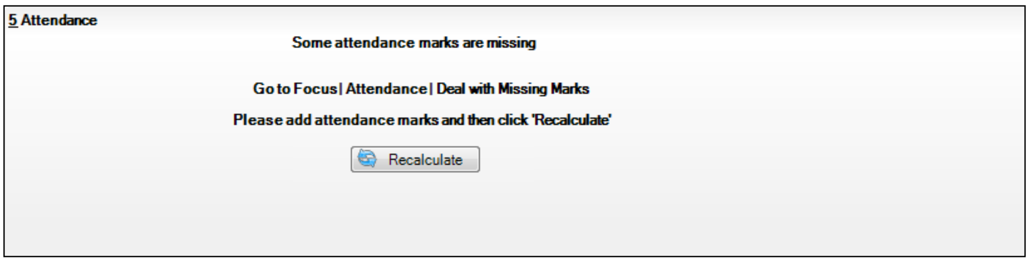
> *TIP: After the Create and Validate process is run, the Attendance detail report can be used to assist with the checking of attendance data. Select **Attendance Report** from the **Detail Report** drop-down list.*

Are your Attendance Codes DfE Compliant?

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

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

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



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

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

More Information:
Producing Detail Reports on page *42*

Are your Attendance Codes DfE Non-Compliant?

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

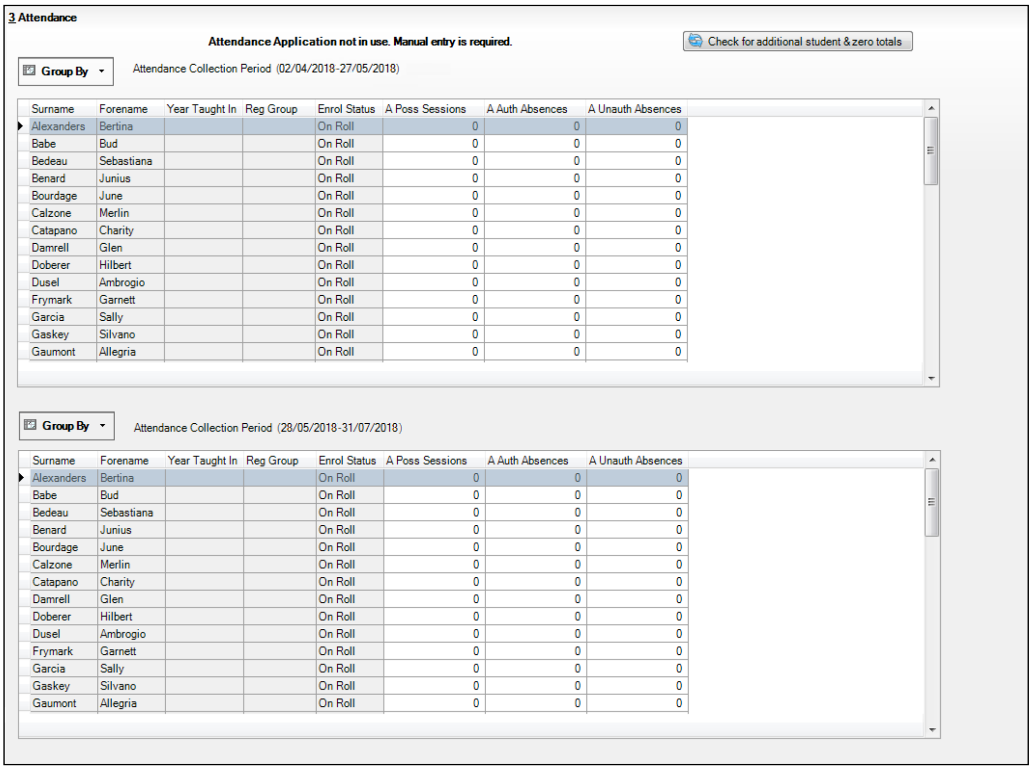
1. Non-compliant codes must be dealt with. Please contact your Local Support Unit for assistance.
2. Click the **Check attendance codes** button to check that DfE attendance codes are now in use.

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

SIMS Attendance Not in Use

If Attendance is not in use, the following data must be entered manually for the two specified collection periods, i.e. from 02/04/2018 to 27/05/2018 and 28/05/2018 to 31/07/2018:

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



1. To filter the display of pupils in the **Attendance** panel, select **Year Group, Registration Group** or **Enrolment Status** from the **Group By** drop-down list.

   Alternatively, select **Group by None** to display a list of all pupils.
2. To sort the displayed data by surname, forename, year group, registration group or enrolment status, click the appropriate column heading.
3. For each pupil, enter the total number of possible sessions (**T Poss Sessions**), authorised absences (**T Auth Absences**) and unauthorised absences (**T Unauth Absences**) for each of the collection periods.
4. To clear the attendance information and check for additional pupils, click the **Check for additional students & zero totals** button.

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

04| Completing the School Census Autumn Return

Creating and Validating a School Census Return

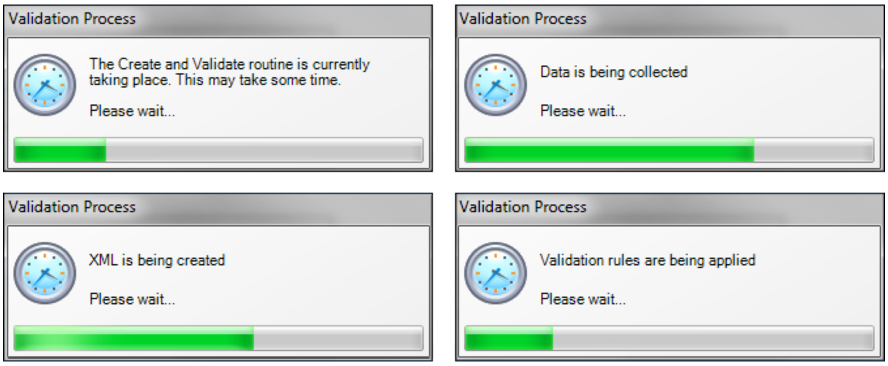
A return must be created, validated and authorised before it can be sent to your Local Authority or uploaded to the DfE COLLECT data collection website (as applicable to your school).

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

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

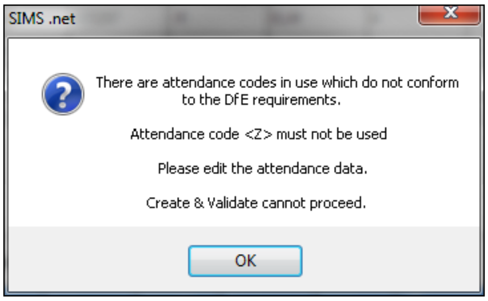
1. Select **Routines | Statutory Returns | School Census** to display the **Census Return** browser.
2. Click the **Search** button to display a list of returns.
3. Double-click the required return to display the **Census Return Details** page.
4. Click the **Create & Validate** button to begin the process.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

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



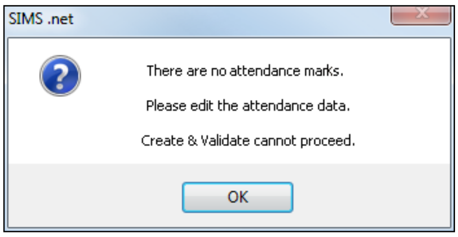
If there is an irregularity in the attendance marks, one of the following messages is displayed:

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



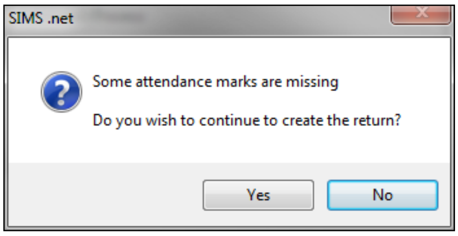
The lack of compliance must be dealt with before the Create and Validate process can be performed. Please contact your Local Support Unit for assistance.

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



Click the **OK** button then edit the attendance data before attempting to create and validate the return again.

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

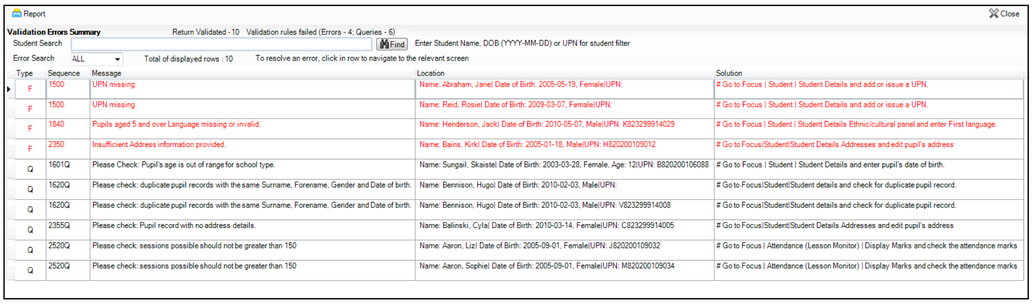
  Click the **Yes** button to continue creating and validating the data.

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

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

Resolving Validation Errors and Checking Queries

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



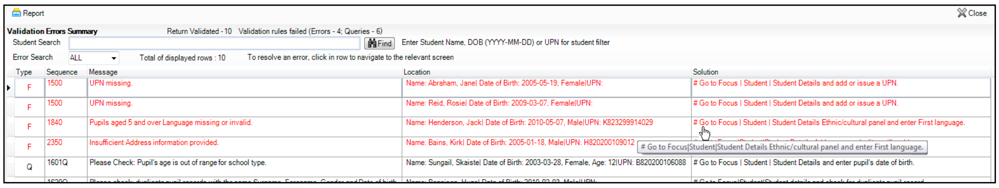
The number of errors and queries found during the Create and Validate process is displayed in the header of the **Validation Errors Summary** panel.

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

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

To assist in the resolution of any errors and queries:

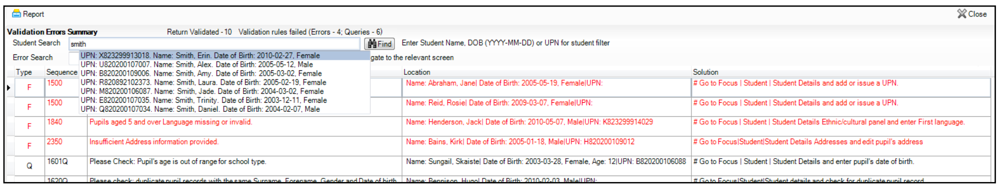
- When the mouse pointer is hovered over a **Message**, **Location** or **Solution** cell, hover help displays the entire content of that cell.
- When the mouse pointer is hovered over an error or query row, it changes to a hand if a hyperlink is available to the area of SIMS where the issue can be checked.



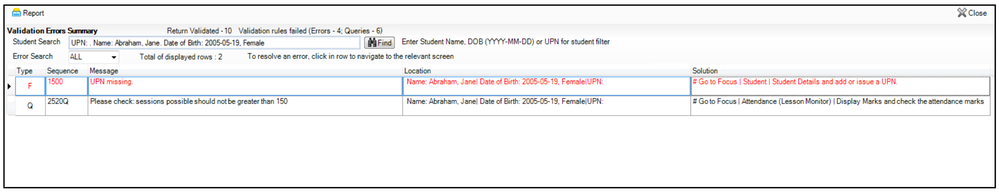
*NOTE: A hyperlink is also indicated by a hash symbol (**#**) preceding the **Solution** text.*

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

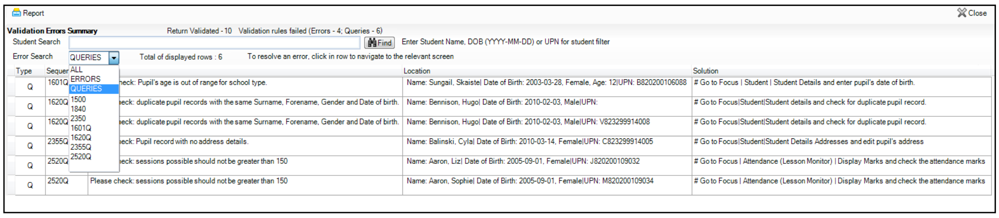
- The Student Search functionality can be used to display all errors and queries relating to a particular pupil. Enter all or part of a UPN, pupil's surname or date of birth in the **Student Search** field then select the required record from the **Student Search** drop-down list to populate the **Student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



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

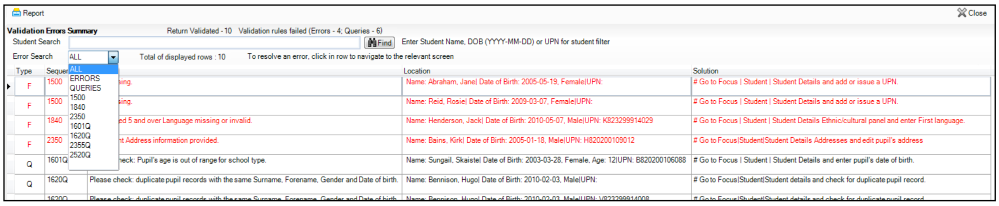


- Use the **Errors Search** to display the required error or query you want to view. Select **ALL**, **ERRORS**, **QUERIES** or the required number from the drop-down list. The total number of rows that relate to the selected validation is displayed adjacent to the **Error Search** field.



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

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



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

- View a summary of validation failures, which is particularly useful if there are a large number of errors/queries, by clicking the **Report** button (located at the left-hand side and directly above the **Validation Errors Summary** panel). The report is displayed in your web browser, e.g. Internet Explorer®, where it can be printed or transferred to another application, if required (please see *Transferring Report Data to a Spreadsheet* on page *48*).

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

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

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

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

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

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

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

More Information:
Transferring Report Data to a Spreadsheet on page *48*

Producing Detail Reports

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

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

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

The following reports are currently available.

On Roll Basic Details Report

Report Criteria: Pupils on-roll on census day.

This report provides the following information about pupils who are on-roll on census day: UPN, legal surname, legal forename, preferred surname, former surname, date of birth, gender, year taught in (YTI), date of admission (DOA), enrolment status, language, class type, part-time status and boarder status.

Leavers Basic Details Report

Report Criteria: Pupils not on-roll on census day, that is:

- Leavers with attendance one term ago (02/04/2018 to 31/07/2018)
- Leavers with exclusions two terms ago (01/01/2018 to 01/04/2018).

This report provides the following information about pupils not on-roll on census day (Leavers): UPN, ULN, former UPN, legal surname, legal forename, middle names, former surname, date of birth (DOB), gender, date of admission (DOA), date of leaving (DOL), language, part-time status, boarder status, attendance and exclusions.

Exclusions Report

Report Criteria: On-roll pupils and leavers with exclusions two terms ago (01/01/2018 to 01/04/2018). Not applicable to pupils who have exclusions with appeal result of **Reinstated** or **Not in the best interests of the child**.

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

Attendance First Half of Summer Term Report

Report Criteria: Pupils with attendance from 02/04/2018 to 27/05/2018. On-roll pupils and leavers (but not boarders) who were aged four to 15 at 31/08/2017.

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

Totals are displayed at the bottom of the applicable columns.

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

Attendance Second Half of Summer Term Report

Report Criteria: Pupils with attendance one term ago (28/05/2018 to 31/07/2018). On-roll and leavers (but not boarders) who were aged four to 15 at 31/08/2017.

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

Totals are displayed at the bottom of the applicable columns.

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

Absentees Report

Report Criteria: Pupils who have missed 14 sessions and whose absence might need to be tracked. On-roll pupils and leavers (not boarders) with attendance one term ago (02/04/2018 to 27/05/2018) who were aged four to 15 at 31/08/2017, not including the second half of the summer term.

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

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

SEN Report

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

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

Address Details Report

Report Criteria: Pupils on-roll on census day.

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

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

School Dinner Taken Report

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

- Pupils in Year Taught In R, 1 and 2.
- Pupils in Year Taught In X who are aged four to six and who were born between 01/09/2011 and 31/08/2014 inclusive (Special schools only).

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

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

Free School Meal Eligibility Report

Report Criteria: On-roll pupils on census day who were eligible for free school meals on or after 18/05/2018 and up to and including census day.

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

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

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

AP Placements Report

Report Criteria: Pupils on-roll on census day having Alternative Provision (AP) Placements between 18/05/2018 and 04/10/2018.

This report provides the following information: UPN, legal surname, legal forename, start date, end date, AP URN, AP UKPRN, AP Setting, AP Association, AP Reason, AP Attendance and AP sessions.

Top-up Funding Report

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

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

Early Years Report

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

- All 2 year olds born between 01/09/2015 and 31/08/2016 (Hours at setting and Funded Hours only)
- All 3 year olds born between 01/09/2014 and 31/08/2015
- All 4 year olds born between 01/09/2013 and 31/08/2014 with Year Taught In E1, E2, N1 or N2.

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

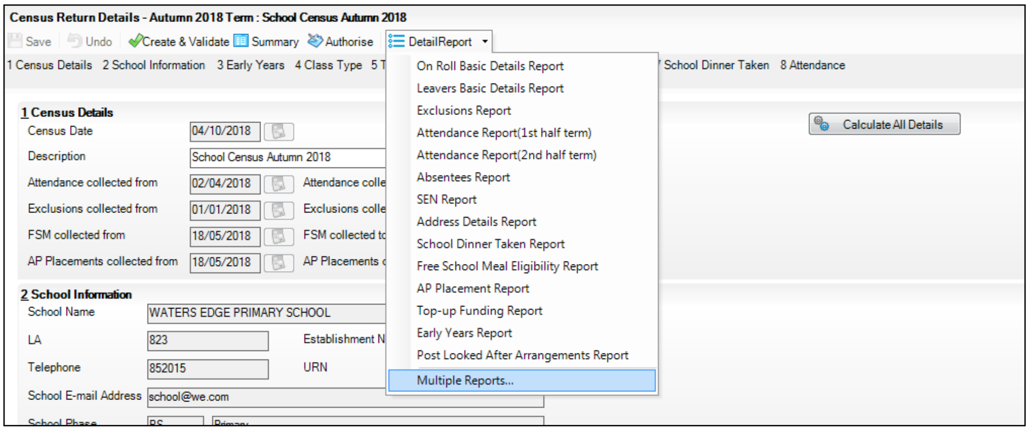
Post Looked After Arrangements Report

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

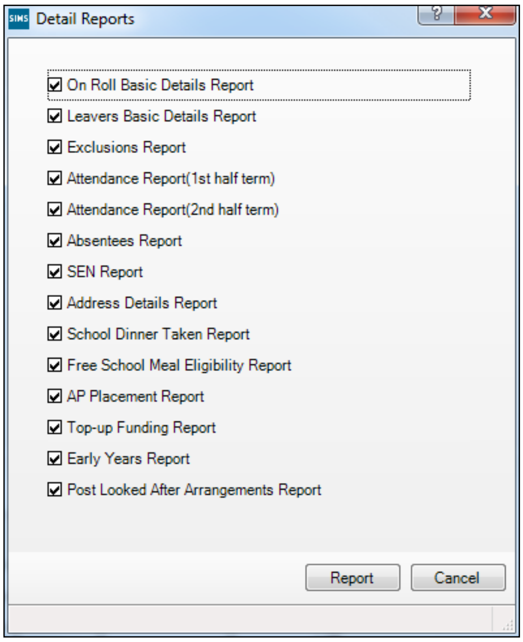
The report provides the following information about pupils who have post looked after arrangements: UPN, legal surname, legal forename, date of birth (DOB), gender, year taught in (YTI) and post looked after arrangements, e.g. ceased to be looked after through a special guardianship order (SGO).

Generating Detail Reports

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



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



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

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

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

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

For example: `8232999_SC3_823LL18_001_onroll_pupil_basic_details_report.html`.

Example of an **On Roll Basic Details** report:

School Census Autumn - 2018 (On Roll Basic Data)

Security Message : This report contains sensitive information.

Report Criteria: Pupils on roll on Census day (04/10/2018)

Total Pupils: **445**

School Name: WATERS EDGE PRIMARY SCHOOL **Fileset Number:** 1000 (SIMS.net)
Filename: 8232999_SC3_823LL18_002.UNA **Report Created:** 18/04/2018
XML Version: Validation 2017.Base - Updated: 2017-07-28 ErrorList 2017.Base - Updated: 2017-07-28 Summary 2017.Base - Updated: 2017-07-28

UPN	Legal Surname	Legal Forename	Preferred Surname	Former Surname	DOB	Gender	YTI	DOA	Enrolment Status	Language	Class Type	Part-time Status	Boarder
N823299911001	Abdullah	Tamwar	Abdullah	-	12/01/2009	Male	-	01/09/2012	Single Registration	English	-	No	Not a Boarder
K823299913001	Abhra	Abjit	Abhra	-	20/11/2009	Male	-	01/09/2013	Single Registration	Bengali	-	No	Not a Boarder
Z823299913002	Abhra	Alisha	Abhra	-	20/11/2009	Female	-	01/09/2013	Single Registration	Bengali	-	No	Not a Boarder
W823299916061	Abhra	Shaquib	Abhra	-	17/12/2013	Male	-	01/09/2016	Single Registration	Bengali	-	No	Not a Boarder
D823299917001	Ackton	Charlotte	Ackton	-	10/02/2014	Female	-	01/09/2017	Single Registration	English	-	No	Not a Boarder
C823299913004	Ackton	Stan	Ackton	-	22/03/2010	Male	-	01/09/2013	Single Registration	English	-	No	Not a Boarder
K823200110081	Adams	Laura	Adams	-	03/03/2007	Female	-	01/09/2011	Single Registration	English	-	No	Not a Boarder
G823299915001	Adams	Nancy	Adams	-	18/12/2011	Female	-	01/09/2015	Single Registration	English	-	No	Not a Boarder
T823299916001	Adams	Sadie	Adams	-	20/03/2013	Female	-	01/09/2016	Single Registration	English	-	No	Not a Boarder
[illegible]	Akeman	Rebecca	Akeman	-	18/09/2007	Female	-	01/09/2012	Single Registration	English	-	No	Not a Boarder

Printing a Report from your Web Browser

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

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

Transferring Report Data to a Spreadsheet

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

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

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

Deleting Temporary Web Browser Files

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

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

Deleting the cache in Internet Explorer 10

1. Open Internet Explorer 10, then select **Tools | Internet options** to display the **Internet Options** dialog.
2. Select the **General** tab.
3. In the **Browsing history** section, click the **Delete** button to display the **Delete Browsing History** dialog.
4. Ensure that the **Temporary Internet Files and website files** check box is selected then click the **Delete** button.

   All temporary files (including any Statutory Returns reports files) that the browser has cached are deleted.
5. Click the **OK** button.

Deleting the cache in Internet Explorer 8 and 9

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

   All temporary files (including any Statutory Returns reports files) that the browser has cached are deleted.
6. Click the **OK** button.

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

Producing the Summary Report

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

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

Generating the Summary Report

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

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

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

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

For example: `8232999_SC3_823LL18_001_Summary_Report.html`.

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

More Information:
Configuring the Census Folder on page *11*
Generating Detail Reports on page *46*
Transferring Report Data to a Spreadsheet on page *48*
Authorising the Return on page *51*
Deleting an Unauthorised Return on page *56*

Editing an Unauthorised Return

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

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

1. Select **Routines | Statutory Returns | <census name>** to display the browser.
2. Ensure that the **Census Folder** and the **Security message for Reports** are correct then click the **Search** button to display any previously created returns. Unauthorised returns can be recognised by their `.UNA` suffix.
3. Double-click the required return. Alternatively, highlight the required return then click the **Open** button to display the **Census Return Details** page.
4. Edit the return details as required.
5. Ensure that the correct value for historical spot allowances has not been specified via **Tools | Setups | Employment Parameters**.

6. Click the **Create & Validate** button to display the **Validation Errors Summary** panel.
7. Resolve any errors and check any queries before running the Summary report and detail reports to ensure that the information is correct.
8. Repeat the editing process again, if necessary.
9. Click the **Save** button.

More Information:
Configuring the Census Folder on page *11*
Specifying the Security Message for Reports on page *12*
Resolving Validation Errors and Checking Queries on page *39*
Producing Detail Reports on page *42*
Producing the Summary Report on page *49*

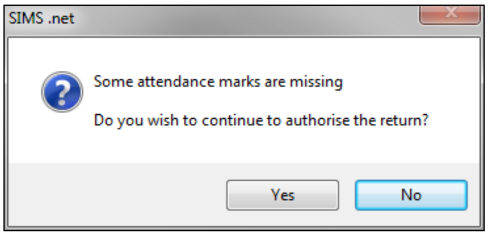
Authorising the Return

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

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

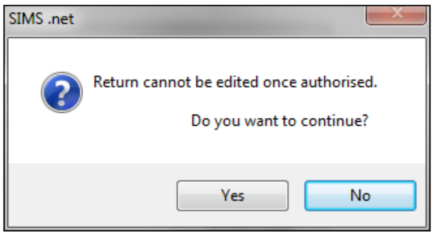
1. Click the **Authorise** button.

   If missing marks exist, the following message is displayed.



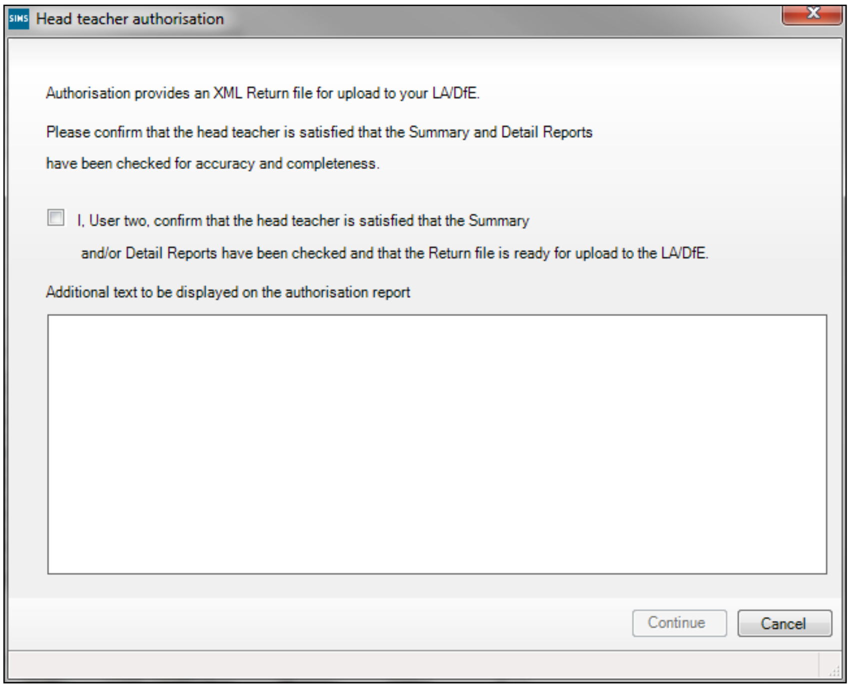
2. Click the **Yes** button to continue with the authorisation process or the **No** button if you want to return to SIMS where the missing marks can be entered.

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



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

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



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

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

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

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

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

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

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

Additional Resources:

Designing and Running Reports handbook

More Information:

Producing the Summary Report on page *49*
Retrieving Authorised Census Return Files on page *54*
Copying a Return on page *55*

Submitting the Return

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

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

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

More Information:

Configuring the Census Folder on page *11*
Copying a Return on page *55*

Retrieving Authorised Census Return Files

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

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

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

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

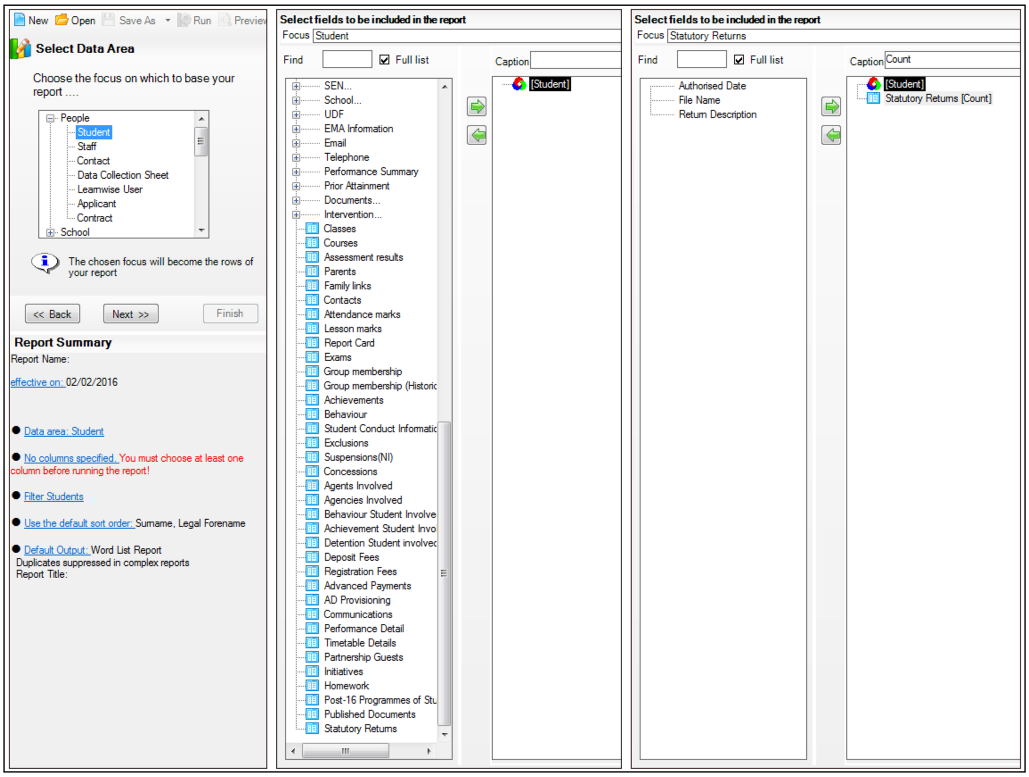
   b. Click the **OK** button to select or create the folder then return to the **Retrieve Authorised Return Files for <census name>** page where the chosen folder name is displayed in the **Download to** field.
4. Highlight the return you wish to retrieve then click the **Retrieve Files** button.

   The authorised return file (i.e. the XML file) and all reports associated with the selected return are downloaded from your DMS to the specified folder. The folder and its contents are then displayed automatically, enabling you to open the required files in your web browser.
5. The contents of the specified folder can be viewed again by clicking the **Folder** button adjacent to the **Download to** field.

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

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

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



Additional Resources:

Designing and Running Reports handbook

Copying a Return

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

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

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

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

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

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

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

   Copy of <description of selected file>.
5. To rename the copied return, highlight it then click the **Open** button to display the **Return Details** page.
6. In the **Census Details** panel, edit the **Description** then click the **Save** button.

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

Deleting an Unauthorised Return

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

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

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

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

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

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School Census Autumn 2017 Preparation Check List

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

Complete	Description
☐	Check with your System Administrator/Manager that you have the appropriate permissions to run the School Census and record associated data (please see *Setting Permissions* on page *3*).
☐	Upgrade to the SIMS 2017 Summer Release (7.176) or later as soon as possible to enable dry runs to be carried out (please see *What Version of SIMS is Required?* on page *4*).
☐	Check with your System Administrator/Manager that the latest fileset version has been imported (please see *Importing Revised Filesets for Validation and Reports* on page *4*).
☐	Carry out a dry run to determine what information needs to be updated (please see *Carrying Out a Dry Run* on page *9*).
☐	Check school Level information (please see *Preparing School Level Information* on page *17*).
☐	Check that leavers and re-admissions have been recorded (please see *Recording Leavers and Re-Admissions* on page *26*).
☐	Delete any pupils record that have been created in error (please see *Deleting Unwanted Pupil Records* on page *29*).
☐	Check the pupils' basic details (please see *Checking a Pupil's Basic Details* on page *29*).
	Check the pupils' various registration details:
☐	Check their enrolment status, admissions date and boarder status (please see *Checking Enrolment Status, Admission Date and Boarder Status* on page *31*).
☐	Check and correct their UPNs (please see *Checking Unique Pupil Numbers* on page *32*).
☐	Check and correct their Unique Learner Numbers (please see *Checking Unique Learner Numbers* on page *34*). Applicable to Special schools only
☐	Check and correct their part-time information (please see *Checking/Correcting Part-Time Pupil Information* on page *35*).
☐	Check and correct their national curriculum year group (please see *Checking National Curriculum Year Groups* on page *37*).
☐	Check free school meal eligibility information (please see *Checking Free School Meals Eligibility* on page *44*).
☐	Check first language information (please see *Checking Ethnic and Cultural Information* on page *46*).
☐	Check and correct special educational needs information (please see *Checking Special Educational Needs Information* on page *49*).

Complete	Description
❑	Check exclusions information (please see *Preparing Exclusions Information* on page *51*). Not applicable to Nursery schools
❑	Check attendance data (please see *Preparing Termly Attendance Information* on page *56*). Not applicable to Nursery schools
❑	Check class information (please see *Updating Class Types* on page *54*). Applicable to Primary schools only
❑	Check hours for Early Years children information. Applicable to schools with Early Years children only

Notes

C| Contents

01 | Getting Started

Introduction

This preparation guide has been produced to help you to identify the most common tasks that need to be carried out before running the School Census Autumn 2017 Return.

The information in this guide applies to all LA maintained Nursery, Primary, Middle deemed Primary, All-Through schools (nursery and primary phase), Special schools and Pupil Referral Units (primary phase). It also applies to Academies that cover any of these school phases.

Information in this guide that relates to a specific school phase is indicated in red, e.g. Applicable to Special schools only.

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

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

Changes to the School Census Autumn Return include the following:

Key Dates for the School Census Autumn 2017 Return

Census day: 05/10/2017

Attendance data collected from 17/04/2017 to 31/07/2017

Exclusions data collected from 01/01/2017 to 16/04/2017

FSM (Free School Meal) data collected from 19/05/2017 to 05/10/2017.

Changes to Early Years

Applicable to schools with Early Years children only

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

- Disability Access Fund

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

- 30 Hour Code

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

- Extended Funded Hours

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

- Hours and Minutes Format

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

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

More Information:
Checking Early Years Data on page *60*

Report Dictionary Changes

Reports | Design Report – Student | Additional Information

Three new columns have been added to the report dictionary:

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

Early Years Attendance

Tools | Setups | Attendance Setup | Early Years Provisions Setup

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

Additional Resources:

Managing Pupil/Student Attendance handbook

Update Hours

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

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

More Information:
Updating Early Years Data on page *58*

Early Years Report

Routines | Statutory Returns | School Census

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

On Roll Basic Details Report

Routines | Statutory Returns | School Census

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

Special Educational Needs

The following new items are collected for all the School Census Returns and displayed in the SEN Detail report:

- Member of SEN unit (sometimes called special class) indicator
- Member of resourced provision indicator.

Establishment Unique Reference Number

Focus | School | School Details

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

More Information:
Checking Establishment Details on page *17*

Setting Permissions

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

Producing the Return

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

Editing and Preparing Data

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

- Administration Assistant
- Admissions Officer
- School Administrator.

Importing Revised Files

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

- Returns Manager
- System Manager.

Where to find More Information about Permissions

Please contact your System Administrator/Manager if you are not sure whether you have the required permissions. For more information, please refer to the *Managing SIMS Users, Groups and Databases* handbook.

What Version of SIMS is Required?

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

To check which version of SIMS is installed, open SIMS and then select **Help | About SIMS**. A dialog similar to the one shown in the following graphic is displayed.

The version should read 7.176 or later.

Importing Revised Filesets for Validation and Reports

Applicable to the Personnel Officer, Returns Manager and System Manager

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

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

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

Before Importing the Revised Files

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

If the connection is unsuccessful, check the following details:

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

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

Additional Resources:

Setting up and Administering SIMS handbook

Importing the Revised Files

1. If revised files are supplied, download the required ZIP file from the blog
2. Unzip the ZIP file to a folder of your choice.
3. In SIMS, select **Tools | Setups | Import Fileset** to display the **Import Fileset** page.

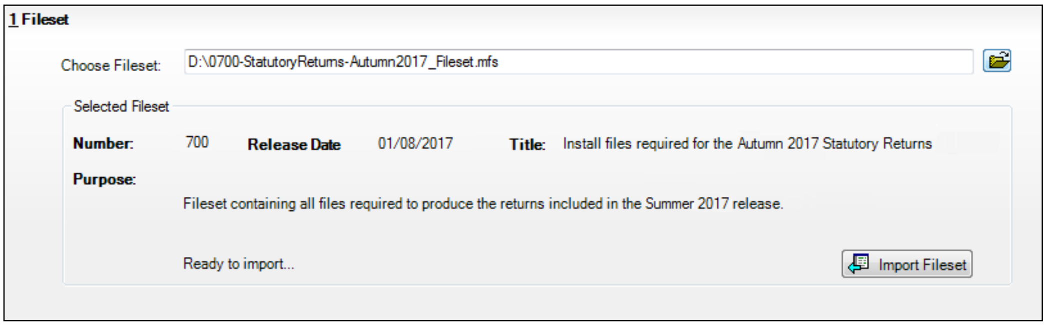
4. Click the **Browse** button to display the **Open** dialog.

5. Navigate to the location of the downloaded fileset. The file name is made up of the following data fields: <Fileset Number>-StatutoryReturns-<Term and Year>_Fileset.mfs.

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

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

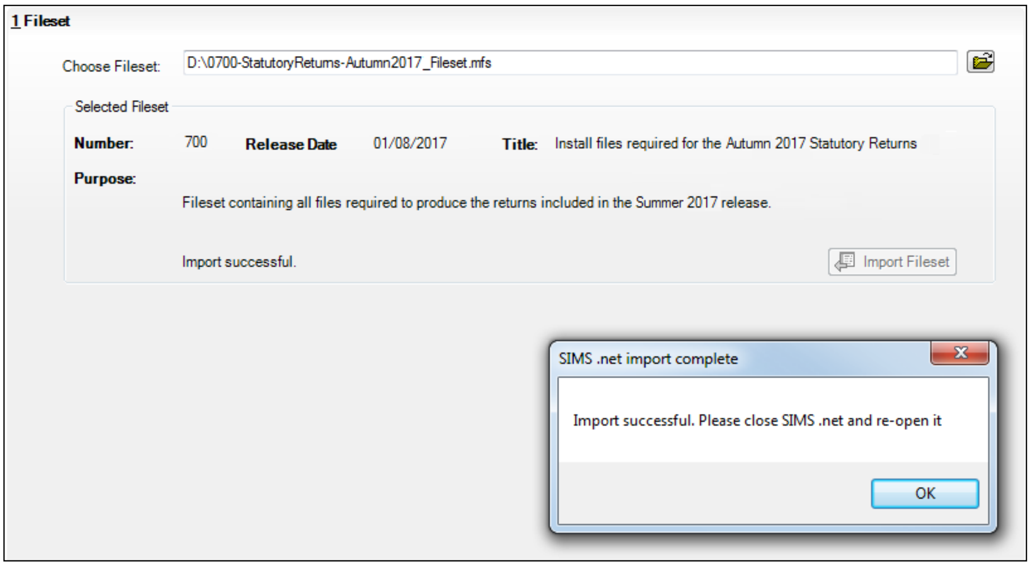
> *NOTE: The following graphics show example data only.*



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

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

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



8. Click the **OK** button then restart SIMS.
9. Run the return in the usual way.

☐ **Completed**

School Census Return Process Flow

The following provides a brief outline of the steps involved in producing the School Census Autumn 2017 Return. If data has been regularly and accurately maintained, many of the activities in this document are unnecessary. However, it is advisable to check to ensure that the information is up-to-date.

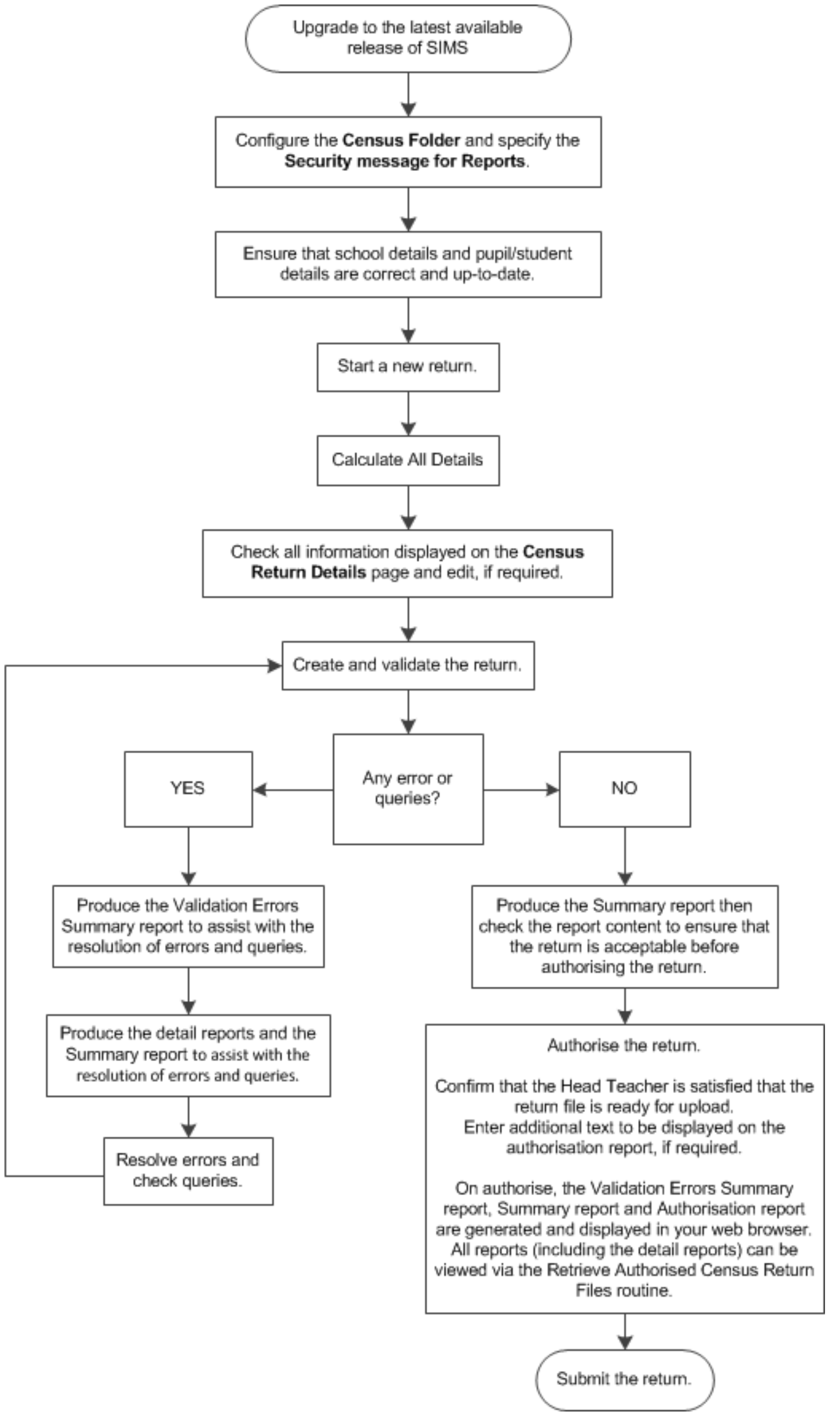
1. Upgrade to the SIMS 2017 Summer Release (7.176) or later.
2. Carry out one or more dry runs to identify any errors that may exist in your data.
3. Ensure that the relevant pupil and school data exists in SIMS and that it is complete and correct. Use the Bulk Update routine (**Routines | Pupil | Bulk Update**) to add missing or correct invalid data, if required.
4. Complete the information on the **Census Return Details** page.
5. Create and validate the return.
6. Resolve any validation errors/queries and then create and validate the return again.

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

   The detail reports and Summary report can be generated to assess the accuracy and completeness of the return.
7. Provide the Head Teacher with the latest copy of the Summary report to enable them to check that all information is correct before they give approval for authorisation of the return.

   The Summary report can be used in conjunction with the detail reports.
8. Once approval has been given, authorise the return (**Routines | Statutory Returns | School Census – Authorise** button).

9. Upload the return to the DfE COLLECT data collection website or submit it to your Local Authority, as applicable.



02| Carrying Out a Dry Run

Why Carry out a Dry Run?

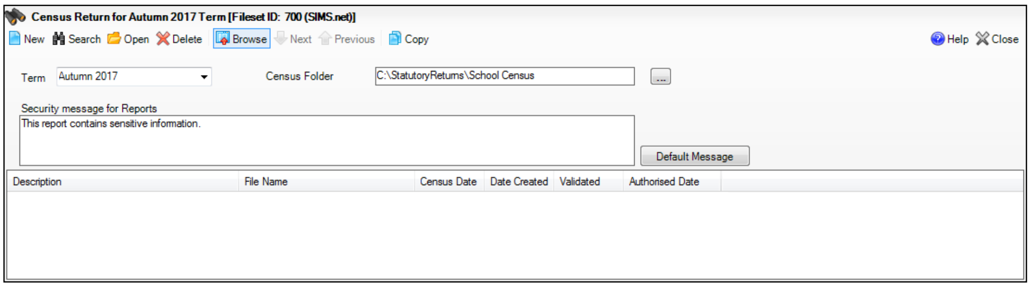
When you have upgraded to the SIMS 2017 Summer Release (7.176), you can carry out one or more dry runs of the return.

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

Whilst a significant number of errors may be generated, many of the errors that relate to pupils, e.g. language, can be fixed quickly using the Bulk Update routine (please see *Updating Information Using the Bulk Update Routine* on page *22*).

The Dry Run Process

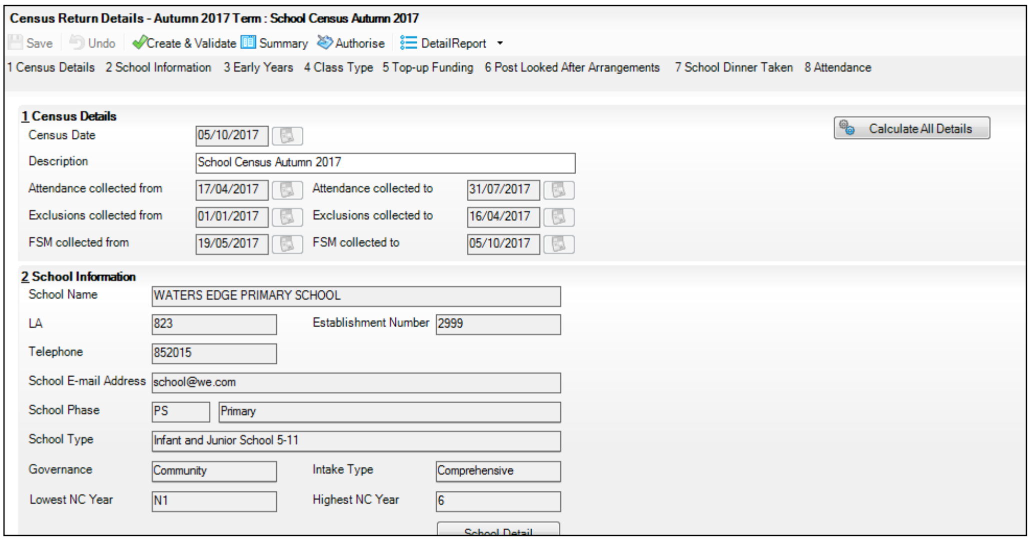
1. Select **Routines | Statutory Returns | School Census** to display the **Census Return for Autumn Term** browser.



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

> ***IMPORTANT NOTE:*** *Due to the sensitive nature of some of the data stored in SIMS, careful consideration should be given when specifying the location of any folder into which you save sensitive data, e.g. census returns, imported and exported CTFs, etc. You should be mindful of your school's responsibilities with respect to information security.*
>
> *Consider which users have access to the chosen folder, especially if the folder is shared on a server. The DfE recommends ISO27001 as the standard for information security (http://www.itgovernance.co.uk/iso27001.aspx). If you are in any doubt, you should consult with your IT Security Officer before proceeding.*

3. Click the **New** button to display the **Census Return Details** page.



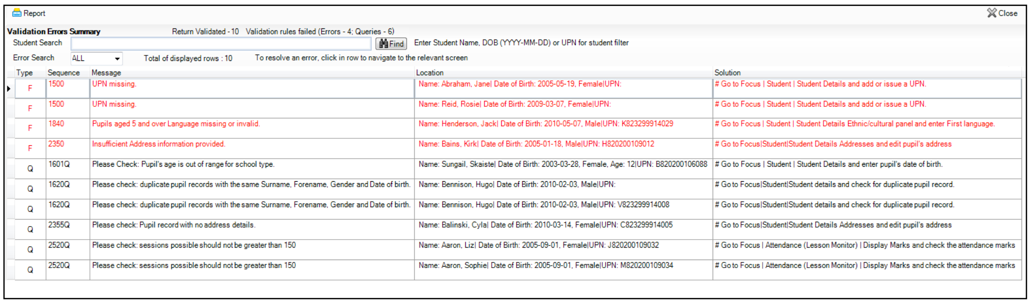
4. By default, the return **Description** is displayed as **School Census Autumn 2017**. Edit the **Description** to any name that will clearly distinguish this dry run from the actual return, which will be generated later, e.g. `Autumn17Test`.
5. In the **Census Details** panel, click the **Calculate All Details** button to extract the required information from the SIMS database and display the results in the various panels of the **Census Return Details** page.
6. If there is any missing or invalid data, an error message is displayed on the Status Bar. This data must be added or corrected before the return can be created and validated.
7. Click the **Create & Validate** button to start the validation process. This may take some time. Any missing or invalid data is listed in the **Validation Errors Summary** panel, located at the bottom of the page.

Additional Resources:

Detailed information about completing the individual panels on the **Census Return Detail** page is available in the *Producing the School Census Autumn 2017 Return* handbook applicable to your school type.

Resolving Validation Errors and Checking Queries

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



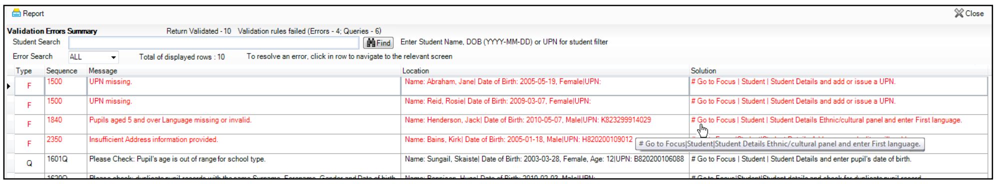
The number of errors and queries found during the Create and Validate process is displayed in the header of the **Validation Errors Summary** panel.

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

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

To assist in the resolution of any errors and queries:

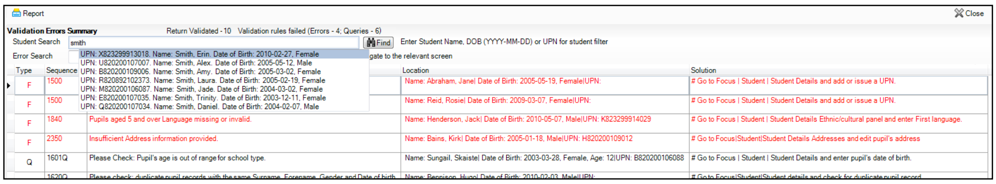
- When the mouse pointer is hovered over a **Message**, **Location** or **Solution** cell, hover help displays the entire content of that cell.
- When the mouse pointer is hovered over an error or query row, it changes to a hand if a hyperlink is available to the area of SIMS where the issue can be checked.



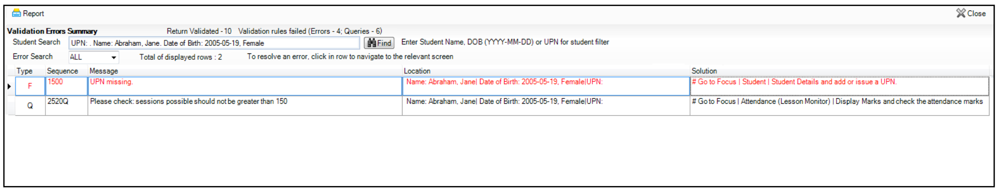
*NOTE: A hyperlink is also indicated by a hash symbol (**#**) preceding the **Solution** text.*

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

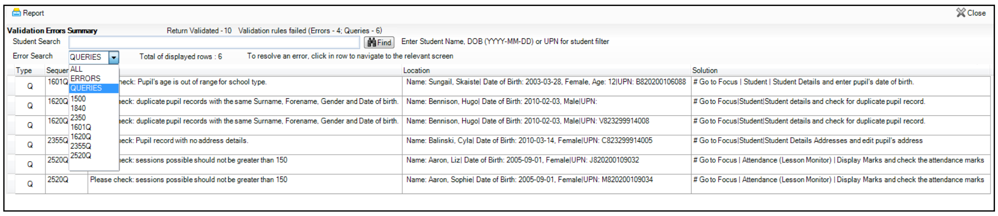
- The Student Search functionality can be used to display all errors and queries relating to a particular pupil. Enter all or part of a UPN, pupil's surname or date of birth in the **Student Search** field then select the required record from the **Student Search** drop-down list to populate the **Student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



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

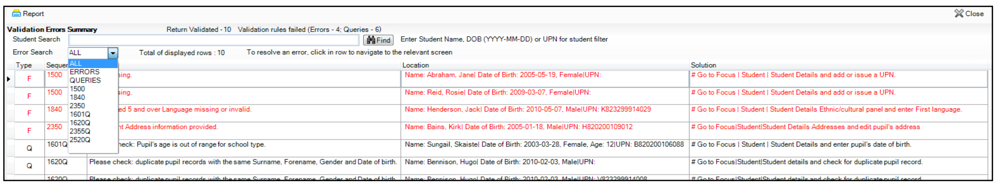


- Use the **Errors Search** to display the required error or query you want to view. Select **ALL**, **ERRORS**, **QUERIES** or the required number from the drop-down list. The total number of rows that relate to the selected validation is displayed adjacent to the **Error Search** field.



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

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



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

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

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

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

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

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

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

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

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

Producing Detail Reports

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

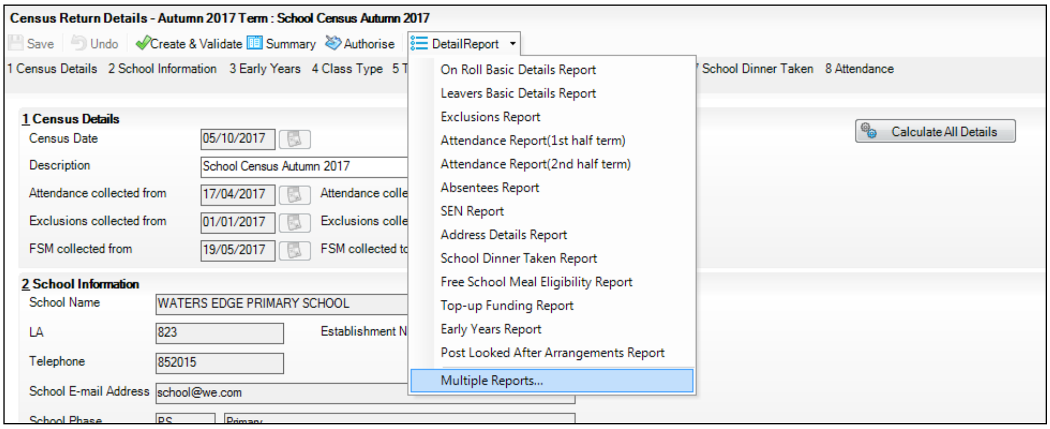
The following reports are currently available:

- On Roll Basic Details Report
- Leavers Basic Details Report (not applicable to Nursery schools)
- Exclusions Report (not applicable to Nursery schools)
- Attendance Report (1st half term) (not applicable to Nursery schools)
- Attendance Report (2nd half term) (not applicable to Nursery schools)
- Absentees Report (not applicable to Nursery schools)
- SEN Report

- Address Details Report
- School Dinner Taken Report (not applicable to Nursery schools)
- Free School Meal Eligibility Report
- Top-up Funding Report
- Early Years Report (applicable to schools with Early Years children only)
- Post Looked After Arrangements Report.

To select a single detail report:

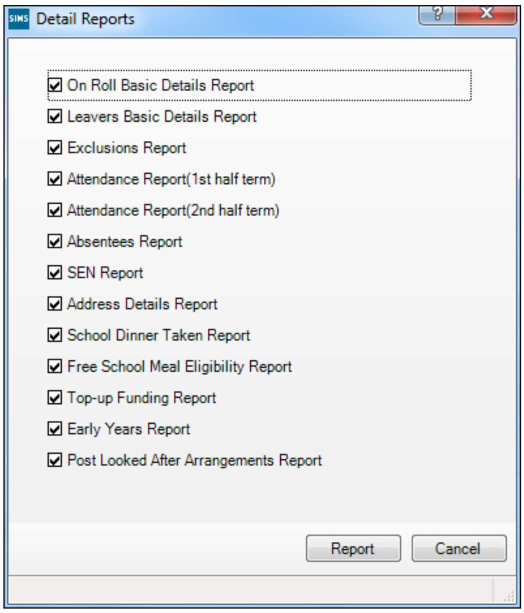
Select the required report from the **Detail Report** drop-down list, located at the top of the **Census Return Details** page. The Primary version of the report list is displayed in the following graphics.



The selected report is generated automatically and displayed in your web browser.

To select multiple detail reports:

1. Select **Multiple Reports...** from the bottom of the **Detail Report** drop-down list to display the **Detail Reports** dialog. By default, all detail reports are selected.



2. If any reports are not required, deselect the associated check boxes.
3. Click the **Report** button to generate the selected reports, which are displayed in your web browser.

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

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

☐ **Completed**

03| Preparing School Level Information

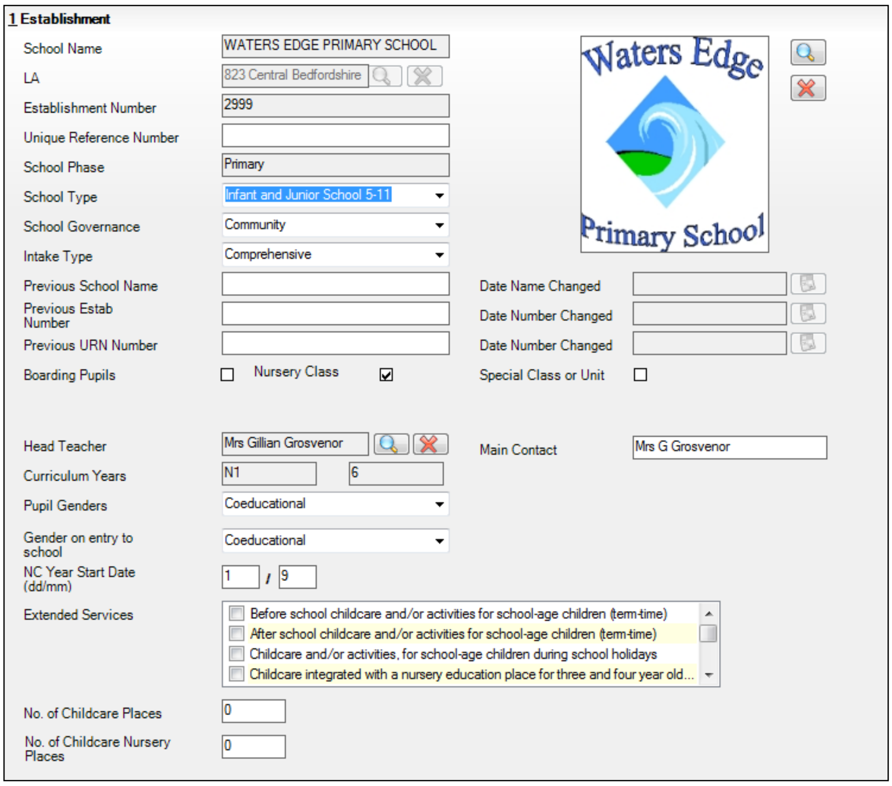
Checking Establishment Details

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

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

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

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



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

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

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

☐ **Completed**

Information for Academies

Academies should also ensure that the following information is recorded, if applicable:

- The **School Type** and **School Governance**.

  Select **Academies** from the applicable drop-down lists.
- The school's **Previous Name** and **Date Name Changed**.
- The **Previous Estab Number** and **Date Number Changed** (both used by the School Census).

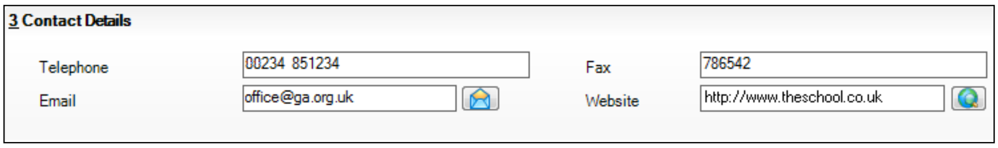
  > *NOTE for Sponsor-led Academies where the DfE number has changed: If applicable, the date of arrival is reported as the date the DfE number changed and historical information from before this is not collected.*
- The **Previous URN Number** (used by other census returns) and **Date Number Changed**.

Checking School Telephone and Email Information

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

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

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



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

   The email address must be the account used on a regular basis. It must also be accessible to the Head Teacher as it might be used for future DfE correspondence.
5. Click the **Save** button, if changes have been made.

☐ **Completed**

04| Preparing Pupil Level Information

Checking Pupil Details

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

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

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

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

The following sections in this guide provide additional information and specific instructions on checking and editing pupil level data. Some of this data can be checked/updated using the Bulk Update routine (please see *Updating Information Using the Bulk Update Routine* on page *22*).

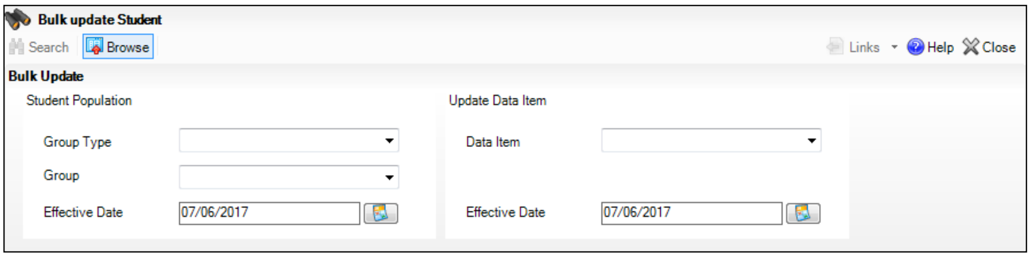
When you have upgraded to the SIMS 2017 Summer Release (7.176), you are strongly advised to carry out one or more dry runs in order to identify any validation errors and queries that must be resolved before the return is submitted (please see *Why Carry out a Dry Run?* on page *9*).

Updating Information Using the Bulk Update Routine

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

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

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



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

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

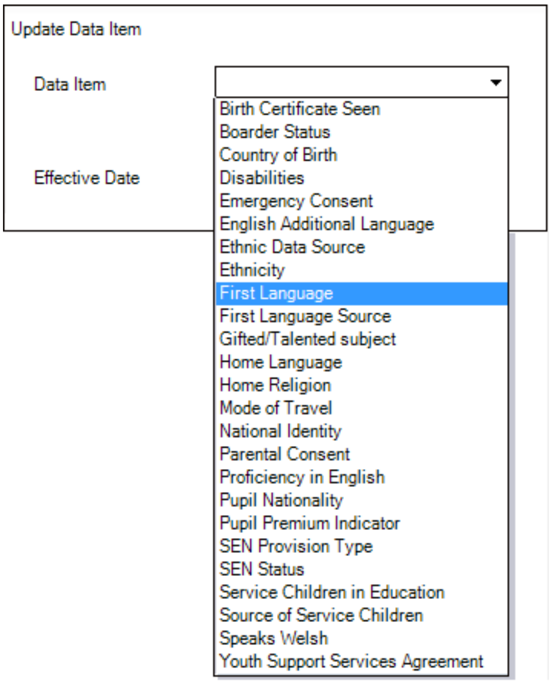
   If searching for missing information, select the particular data field from the **Group Type** drop-down list, such as **First Language**, and then select a specific **Group**, such as **<NONE>**.

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

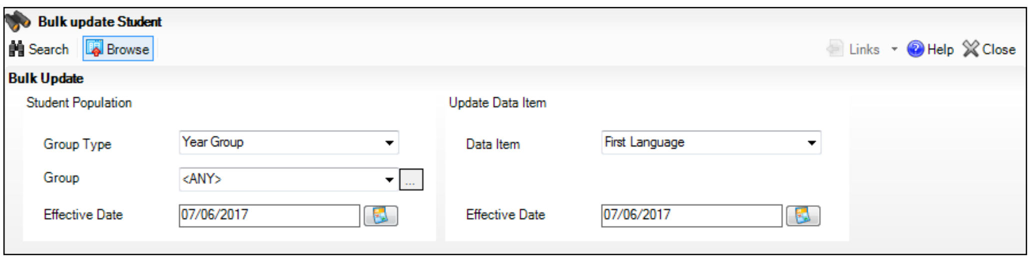
   The following table provides some examples of the searches that can be carried out to identify missing data:

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

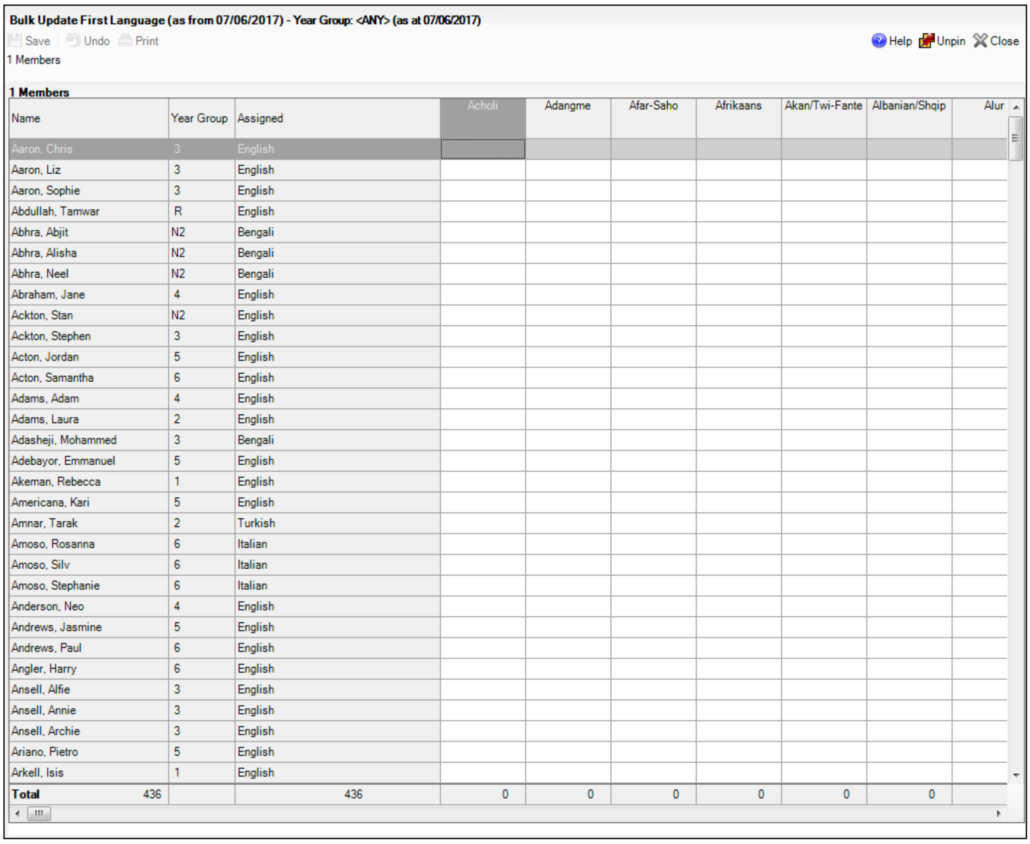
3. Select the required **Data Item** from the drop-down list, e.g. **First Language**.



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



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



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

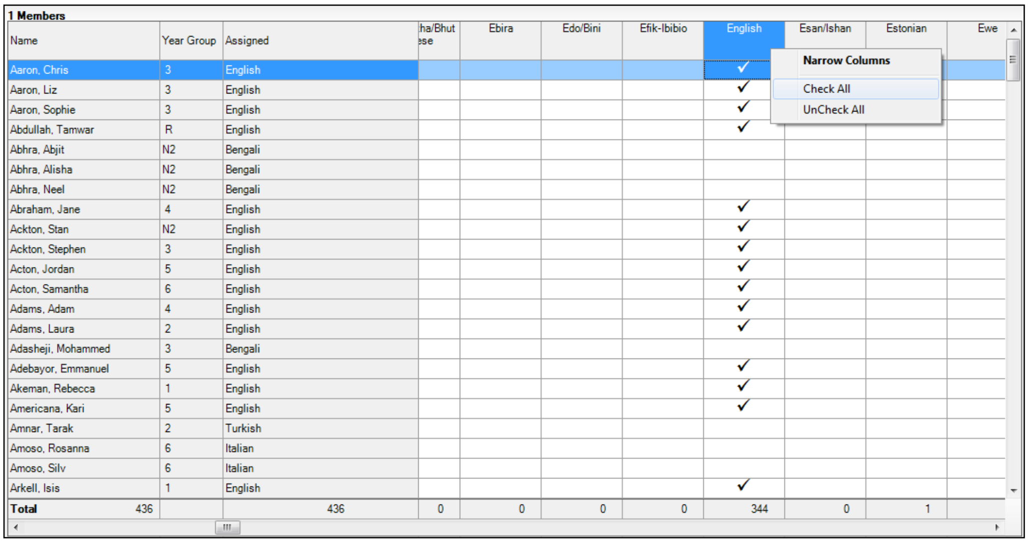
> *TIPS: Use the horizontal and vertical scroll bars to view additional columns or rows as required. To increase the number of columns visible on the page, right-click any column heading then select* ***Narrow Columns*** *from the pop-up menu.*

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

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

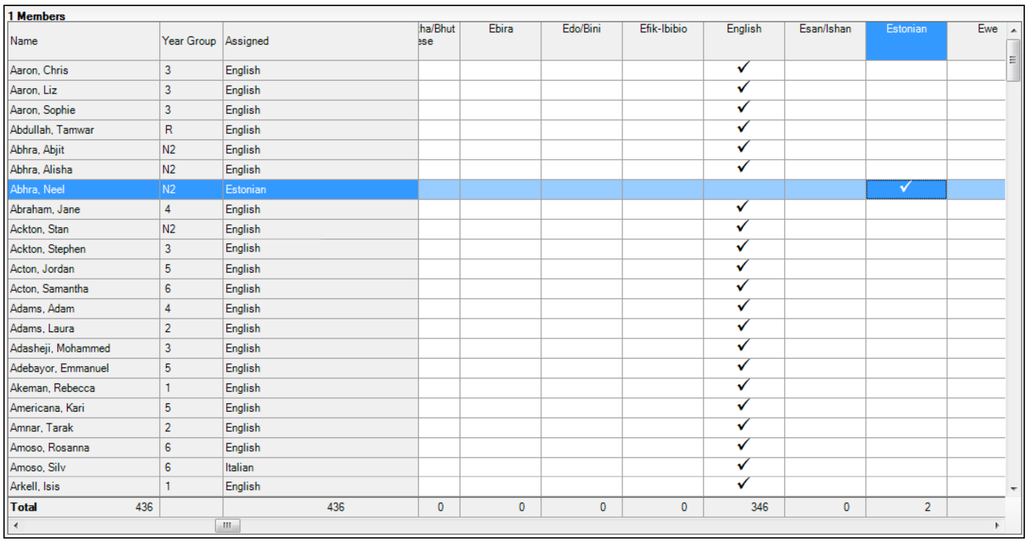
The following example illustrates how to set the ethnicity of all pupils as **English** then edit the exceptions.

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



All the cells within that column are populated with ticks.

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



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

Bulk Updating Data for a Selection of Pupils

There are two methods for selecting a number of pupils.

Entering a Value for a Selection of Pupils

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

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

Entering a Value for Sequentially Listed Pupils

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

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

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

Recording Leavers and Re-Admissions

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

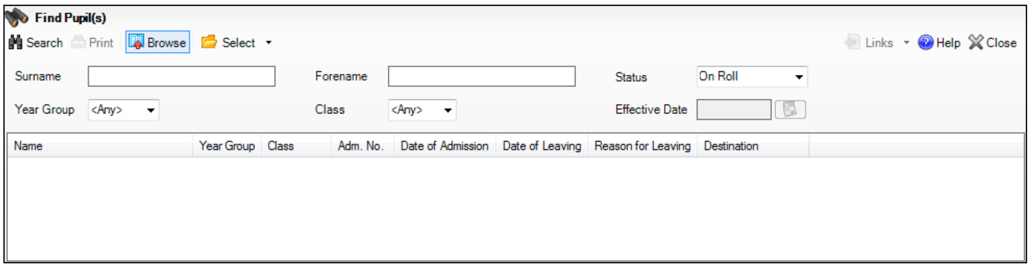
The accuracy of pupil numbers can be checked by running the Population Analysis (Dated) report (**Reports | Run Report – Focus – Student**). This is a predefined report that gives a breakdown of the number of pupils (including numbers by gender) for each registration group in each year, together with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

Recording a Leaver

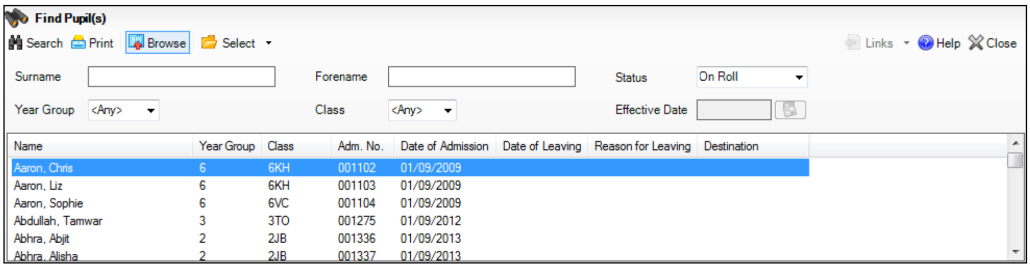
Not applicable to Nursery schools

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

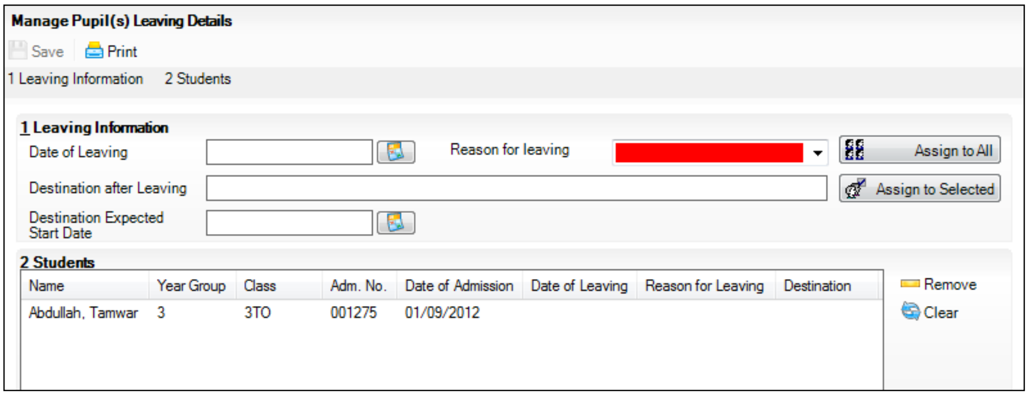
1. Select **Routines | Pupil | Leavers** to display the **Find Pupil(s)** (or **Student(s)**) browser.



2. Ensure that the **Status** of **On Roll** is selected.
3. Click the **Search** button to display a list of all on-roll pupils.



4. Highlight the pupil(s) you wish to record as leavers then click the **Select** button. The selected pupil(s) are displayed in the **Students** panel.



5. In the **Leaving Information** panel, enter the **Date of Leaving** or click the **Calendar** button and select the required date.

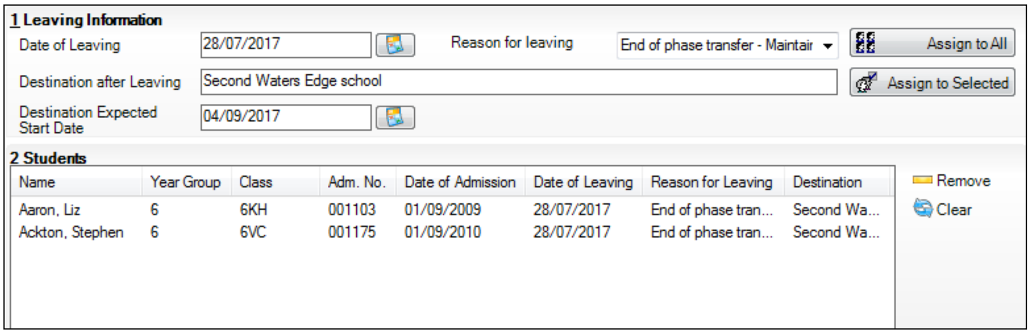
   The date of leaving should be the date that the pupil is actually leaving the school, unless they are transferring from Junior/Primary phase to Secondary phase because Local Authorities normally specify the dates to be used for school transfers so that they match. For example, some authorities prefer not to have any gaps between dates and may suggest a date of leaving (the old school) of 4 September and the date of admission (into the new school) of 5 September. If you are in any doubt, please contact your Local Authority for advice.

6. Select the **Reason for Leaving** from the drop-down list, then either:
   - highlight the pupils to whom this information applies (using the **Ctrl** or **Shift** keys) and click the **Assign to Selected** button; or
   - if the information applies to all the pupils in the list, click the **Assign to All** button.

7. Optionally, enter the **Destination after Leaving** if known, then either:
   - highlight the pupils to whom this information applies (using the **Ctrl** or **Shift** keys) and click the **Assign to Selected** button; or
   - if the information applies to all the pupils in the list, click the **Assign to All** button.

8. Enter the **Destination Expected Start Date**, if known. This is the intended date of starting at the next school and is particularly useful when:
   - in year transfers take place
   - a pupil’s name is deleted from the admission register and the school must inform the local authority.

9. Assign the information to the applicable pupils by either:
   - highlighting the pupils to whom this information applies then clicking the **Assign to Selected** button; or
   - if the information applies to all the pupils in the list, clicking the **Assign to All** button.



10. To remove a pupil from the list, highlight their name then click the **Remove** button.
11. To clear the contents of the **Date of Leaving**, **Reason for leaving** and **Destination after Leaving** fields, highlight the required pupil(s) then click the **Clear** button. Re-enter the information as required.
12. Click the **Save** button.

Completed

Re-Admitting a Pupil

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

> *NOTES: Do not remove the leaving date, as the pupil's period of absence from the school will not be recorded.*
>
> *However, if a pupil is intending to leave but subsequently changes their mind and decides not to leave, the date of leaving can be removed, as continuous attendance has been maintained.*

1. Select **Focus | Pupil | Pupil Details** to display the **Find Student** browser.
2. Click the **New** button to display the **Add Student** page. It is necessary to enter limited information here as you know that the person already exists.
3. Click the **Continue** button to display a list of **Matched People**, based on the criteria entered on the **Add Pupil** page.
4. Highlight the required pupil then click the **Open** button. The following warning message is displayed:

   The selected student is a leaver. Do you want to re-admit the student?
5. Click the **Yes** button if you are certain that this is the pupil who should be re-admitted. Their details are displayed on the **Student Details** page.

6. Complete the mandatory fields (**Date of birth**, **Gender**, **Year Group**, **Enrolment Status**, **Year Taught In** and **Admission Date**) and check any other details that may have changed since they were last on-roll, such as their address.
7. Check that the original **UPN** is displayed.

   If it did not previously exist, generate a new **UPN** by clicking the button adjacent to the **UPN** field to display the **Issue UPN** dialog.

   Select either the **Issue Permanent** or **Issue Temporary UPN** radio button then click the **OK** button to return to the **Registration** panel.

   The temporary/permanent UPN is issued on save.
8. Click the **Save** button to re-admit the pupil.

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

☐ **Completed**

Deleting Unwanted Pupil Records

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

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

☐ **Completed**

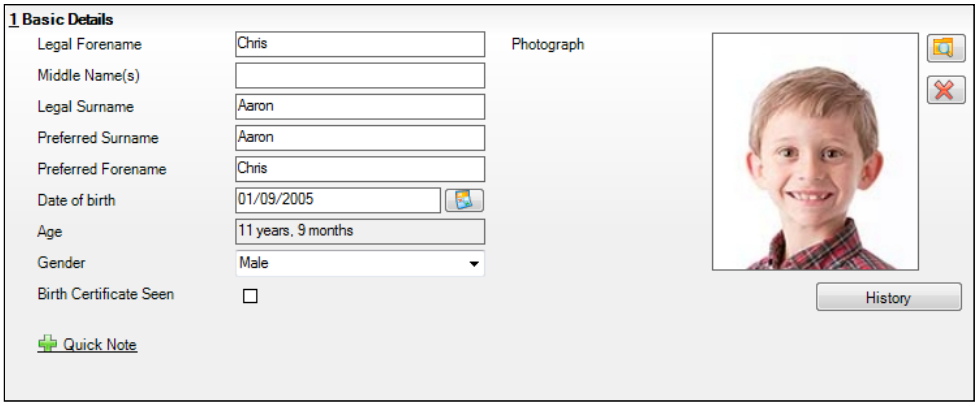
Checking a Pupil's Basic Details

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

The following information is collected in the return:

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

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



3. Check that all the details displayed in the **Basic Details** panel are up-to-date and accurate, paying particular attention to the data collected in the return (listed previously).

   If a legal change (rather than a correction) is made to the **Legal Forename**, **Middle Name(s)** or **Legal Surname**, a **Reason** and **Date of Change** must be recorded.
4. If you have made any changes, click the **Save** button.

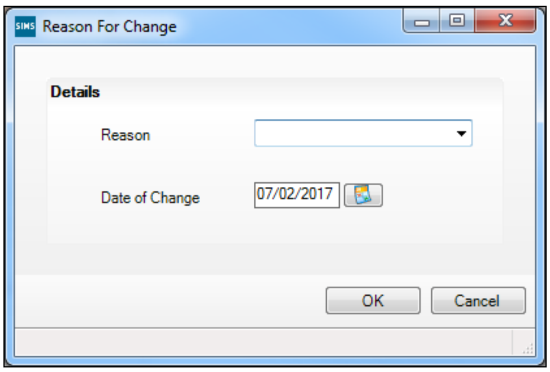
☐ **Completed**

Recording a Pupil's Change of Surname

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

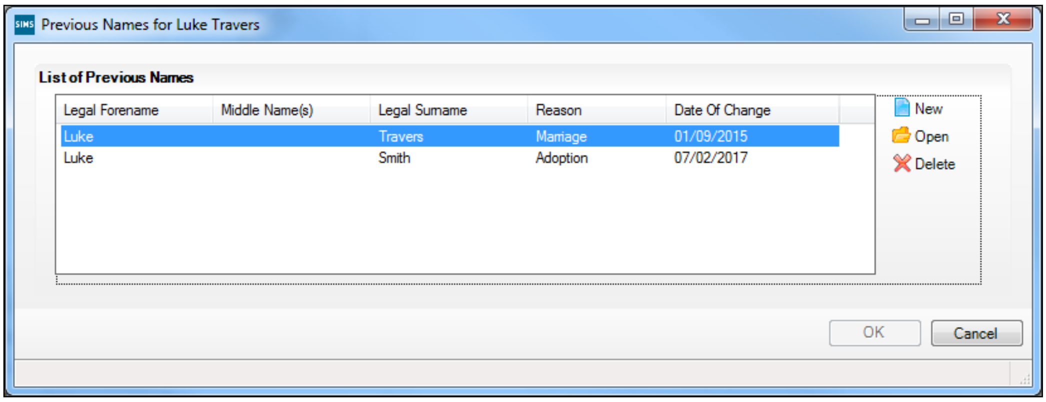
1. In the **Basic Details** panel, edit the pupil's **Legal Surname**.
2. Click the **Save** button. The following message is displayed:

   Is this a correction to the name or a legal change to the student's name? If it is a legal change, please select Yes.
3. Click the **Yes** button to display the **Reason For Change** dialog.



4. Select the applicable **Reason** for change from the drop-down list. This entry is optional but is recommended to maintain a complete history of name changes.

5. The **Date of Change** defaults to today's date but can be amended by clicking the **Calendar** button and selecting an alternative date, if required.
6. Click the **OK** button to return to the **Basic Details** panel.
7. Click the **Save** button.
8. To view a list of the pupil's previous names, click the **History** button to display the **Previous Names for** dialog.



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

☐ **Completed**

Checking Registration Details

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

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

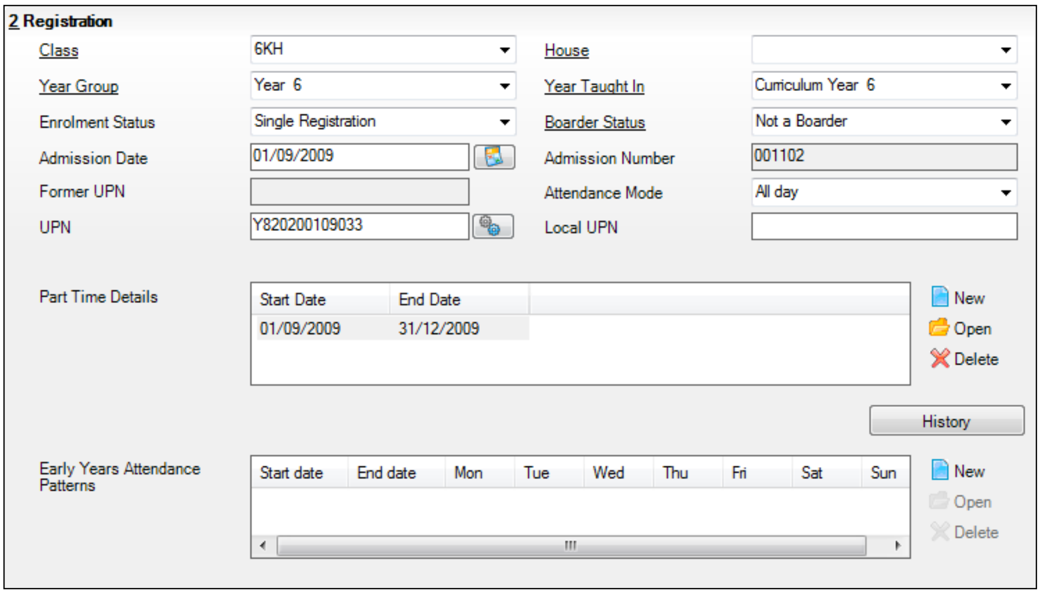
Checking Enrolment Status, Admission Date and Boarder Status

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

- **Enrolment Status** (mandatory information in SIMS)
- **Admission Date** (mandatory information in SIMS)
- **Boarder Status**.

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

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



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

4. Check the pupil's **Enrolment Status**. Select the correct enrolment status from the drop-down list, if required.
5. Ensure that the **Admission Date** is correct. Edit the date or click the **Calendar** button and select a different date, if required.
6. Check the **Boarder Status**. Select the correct boarder status from the drop-down list, if required.
7. Click the **Save** button.

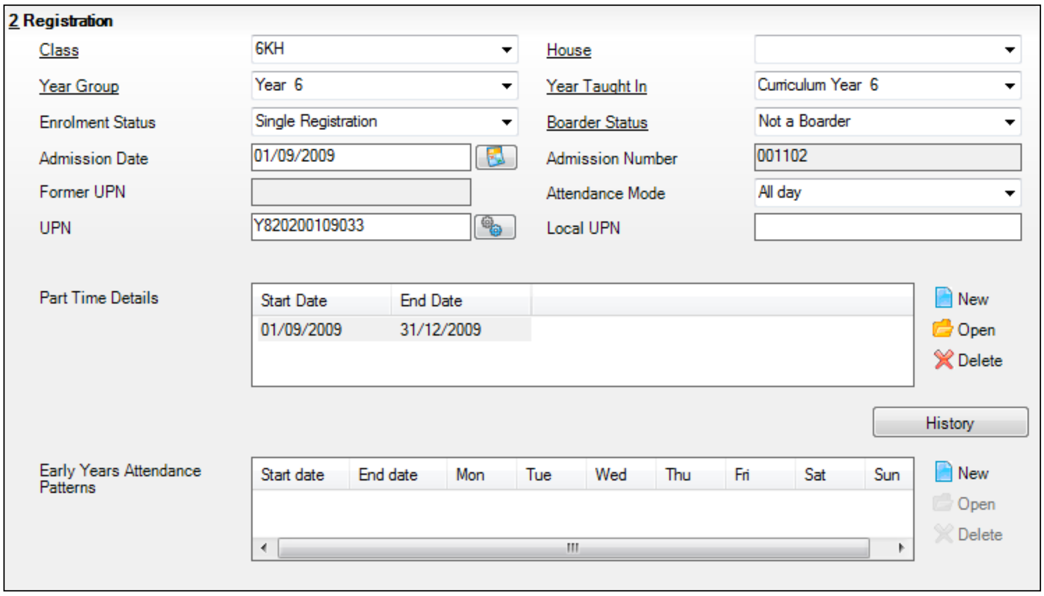
☐ **Completed**

Checking Unique Pupil Numbers

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

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

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

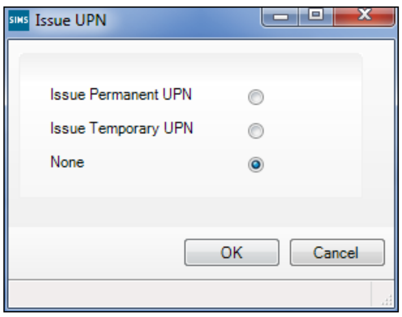


A unique UPN should be entered in the **UPN** field. If the UPN entered has an invalid format, the field turns red indicating that the UPN is incorrect and should be re-entered.

- **Permanent UPNs** are issued to a new pupil only when it is believed that they have never previously been allocated a UPN or to replace a temporary UPN.
- **Temporary UPNs** are issued to a pupil when the permanent UPN is not known to the school, e.g. awaiting transfer file/applicant's information. A temporary UPN can be recognised by the letter after the UPN number, e.g. H82020010701**A**.

4. If necessary, issue a new UPN by clicking the **Generate UPN** button adjacent to the **UPN** field to display the **Issue UPN** dialog.

Generate UPN button



5. Select either the **Issue Permanent UPN** or **Issue Temporary UPN** radio button.

6. Click the **OK** button to return to the **Registration** panel.
7. Click the **Save** button to save any changes. The UPN is generated automatically when the record is saved.

> *NOTE: A pupil who is adopted after being allocated a UPN is often issued with a new permanent UPN. However, the exact process may vary depending on the circumstances and the guidance issued by your LA/DfE.*
>
> *For information about issuing a new UPN for an adopted child, please seek advice from your LA, if applicable.*
>
> *DfE guidance is also available on the GOV.UK website (https://www.gov.uk/government/publications/unique-pupil-numbers).*

☐ **Completed**

Checking Unique Learner Numbers

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

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

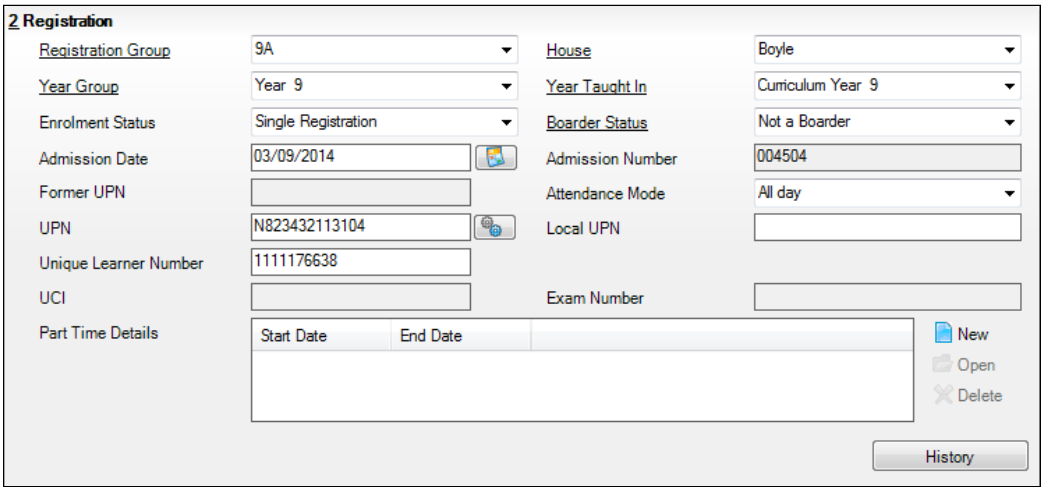
Learning Records Service (previously known as the Managing Information Across Partners Programme) issues and maintains a ULN record for applicable pupils. ULNs can be obtained in one or more of the following ways:

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

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

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

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



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

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

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

☐ **Completed**

Checking/Correcting Part-Time Pupil Information

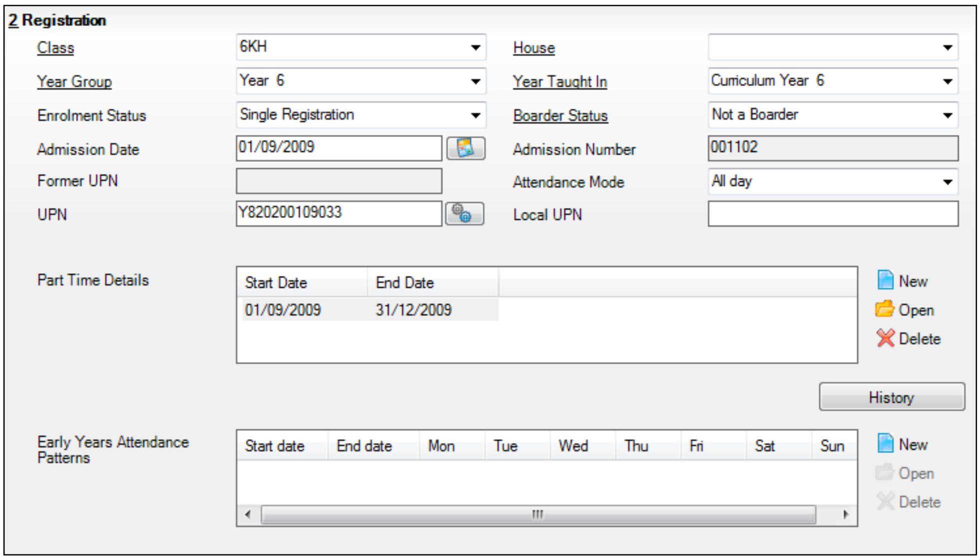
The collection of part-time details is mainly relevant to Nursery schools (or schools with nursery age children) and Primary schools with Reception years. However, any pupil can be marked as part-time if their attendance is anything less than 10 sessions per week.

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

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

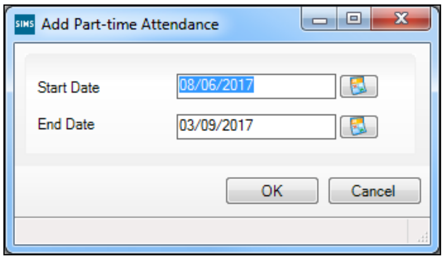
1. Select **Focus | Pupil | Pupil Details** to display the **Find Pupil** browser.
2. Search for then double-click the name of the required pupil to display the **Pupil Details** page.

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



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

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



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

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

☐ **Completed**

Checking National Curriculum Year Groups

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

For the School Census Autumn 2017 Return, the collection of attendance data uses the Age at Date as at 31/08/2016. All other data uses 31/08/2017.

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

Curriculum Year the Pupil would Normally be Taught in	Date of Birth Range	Age Range
	After 31/08/2015	1 and under
N1	01/09/2014 to 31/08/2015	2 – 3
N2	01/09/2013 to 31/08/2014	3 – 4
R	01/09/2012 to 31/08/2013	4 – 5
1	01/09/2011 to 31/08/2012	5 – 6
2	01/09/2010 to 31/08/2011	6 – 7
3	01/09/2009 to 31/08/2010	7 – 8
4	01/09/2008 to 31/08/2009	8 – 9
5	01/09/2007 to 31/08/2008	9 – 10
6	01/09/2006 to 31/08/2007	10 – 11
7	01/09/2005 to 31/08/2006	11 – 12
8	01/09/2004 to 31/08/2005	12 – 13
9	01/09/2003 to 31/08/2004	13 – 14
10	01/09/2002 to 31/08/2003	14 – 15
11	01/09/2001 to 31/08/2002	15 – 16
12	01/09/1900 to 31/08/2001	16 – 17
13	01/09/1999 to 31/08/2000	17 – 18
	Before 31/08/1999	19+

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

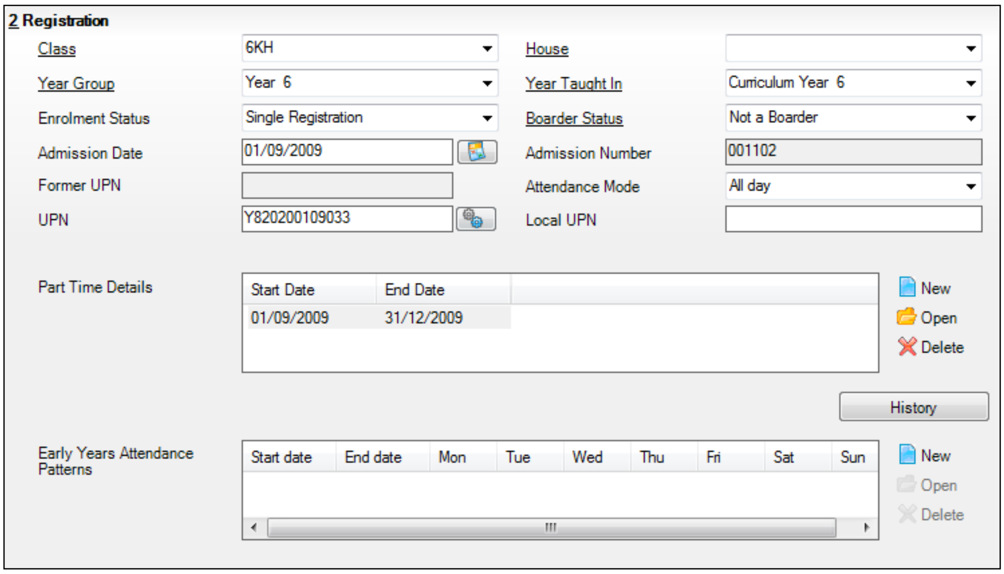
- Via individual pupil records (**Focus | Pupil | Pupil Details**).
- Via the pastoral structure by curriculum year (**Focus | School | Pastoral Structure | Current Structure**).
- Via the pastoral structure for the whole school (**Focus | School | Pastoral Structure | Current Structure**).

Additional Resources:

Managing Pupil/Students handbook
Setting up and Administering SIMS handbook

Checking the Pupil's Year Taught In Record

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



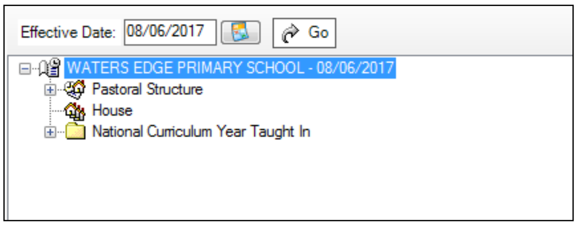
> *NOTE: **The Early Years Attendance Patterns** section of the **Registration** panel is visible to Primary schools only.*

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

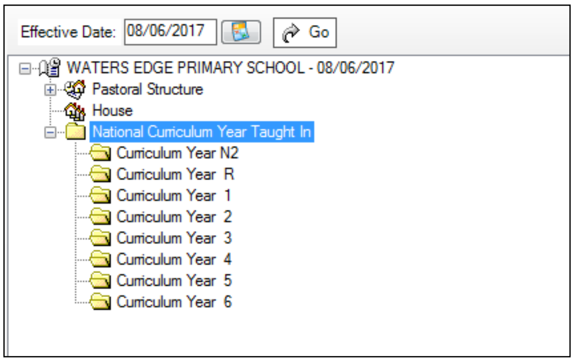
> *NOTE: Any change made in the **Registration** panel is effective from today's date. If the **Year Taught In** change was applicable from an earlier date, click the **History** button and apply the change from the actual date the change is required.*

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

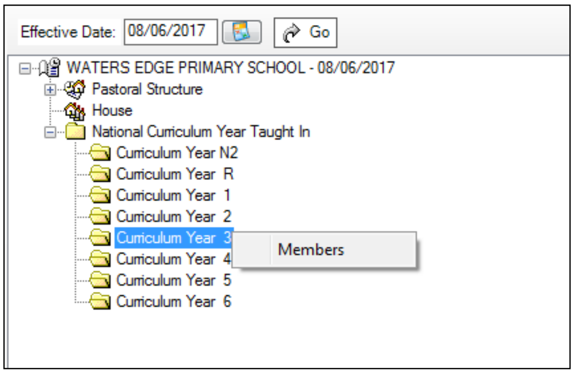
1. Select **Focus | School | Pastoral Structure | Current Structure** to display the **Current Academic Year Pastoral Structure** page.
2. Click the **Go** button.



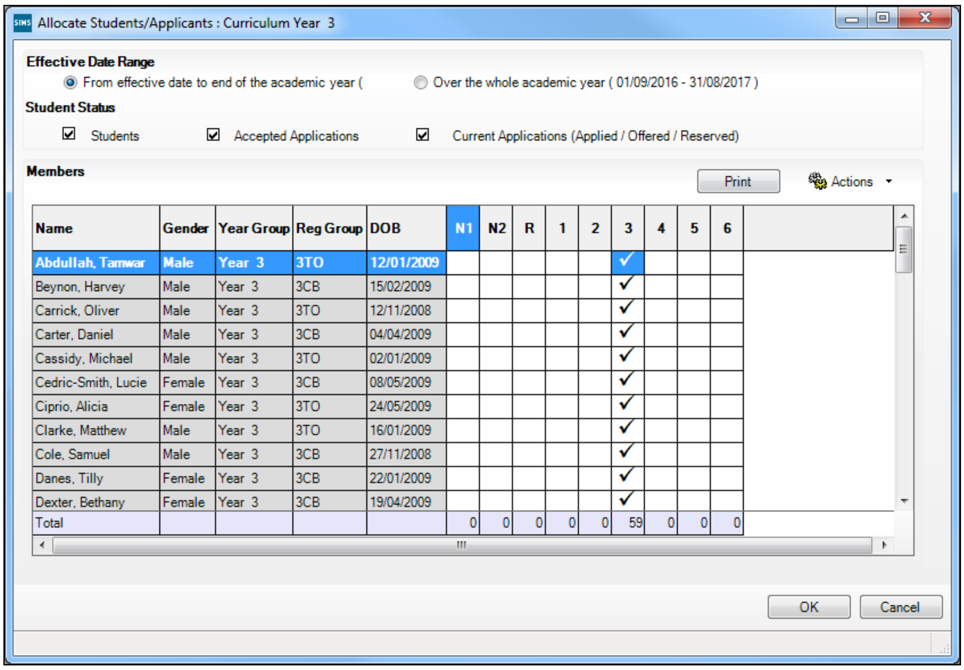
3. Expand the **National Curriculum Year Taught In** folder by clicking the **+** icon or double-clicking the folder name. The curriculum years are displayed beneath.



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



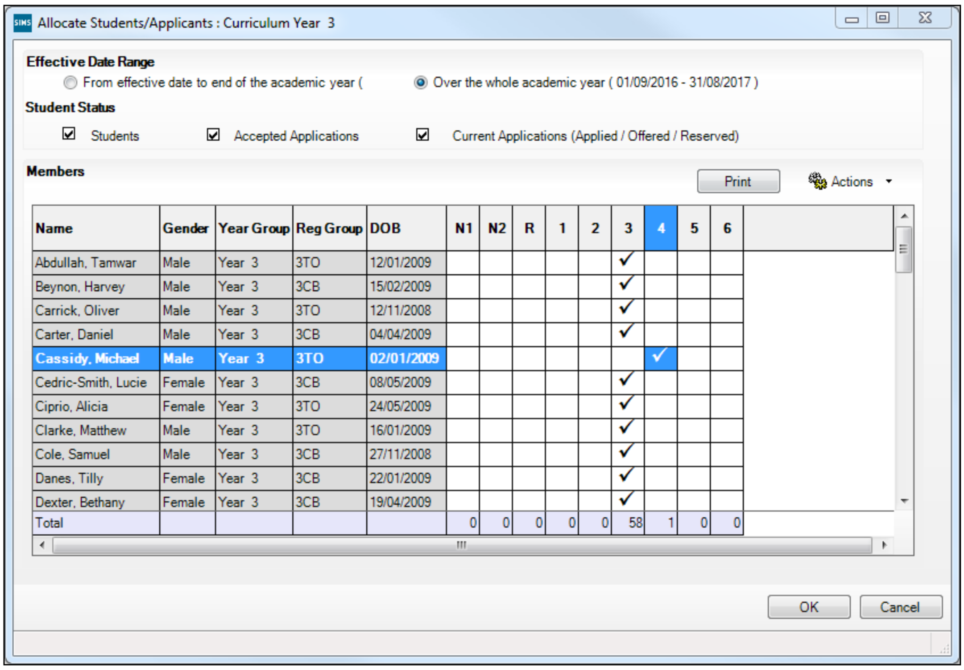
The **Allocate Pupils/Applicants** dialog is displayed.



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

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

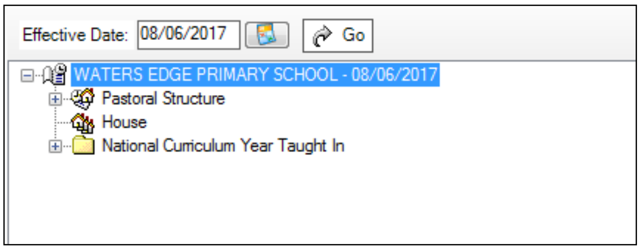
   The following graphic shows that one pupil is taught in Year **4**.



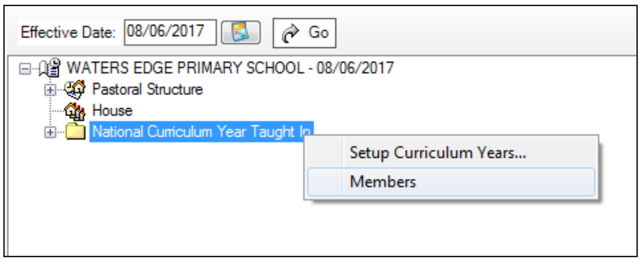
7. Ensure that <u>all</u> pupils are allocated membership to the correct **National Curriculum Year Taught In** and then click the **OK** button to return to the **Current Academic Year Pastoral Structure** page.
8. Repeat for the other curriculum years, where applicable.
9. Click the **Save** button.

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

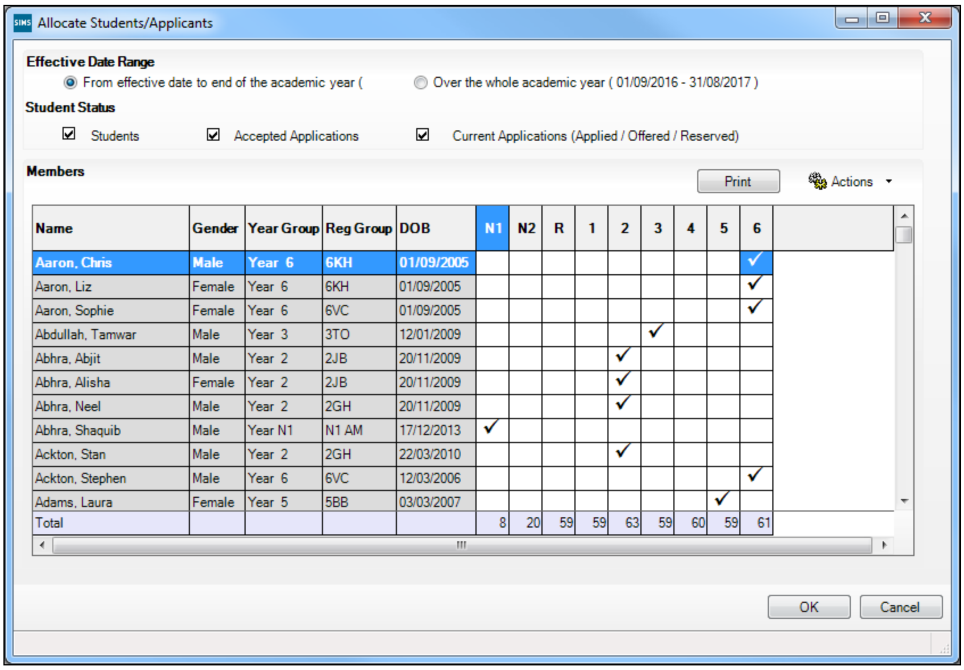
1. Select **Focus | School | Pastoral Structure | Current Structure** to display the **Current Academic Year Pastoral Structure** page.
2. Click the **Go** button.



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



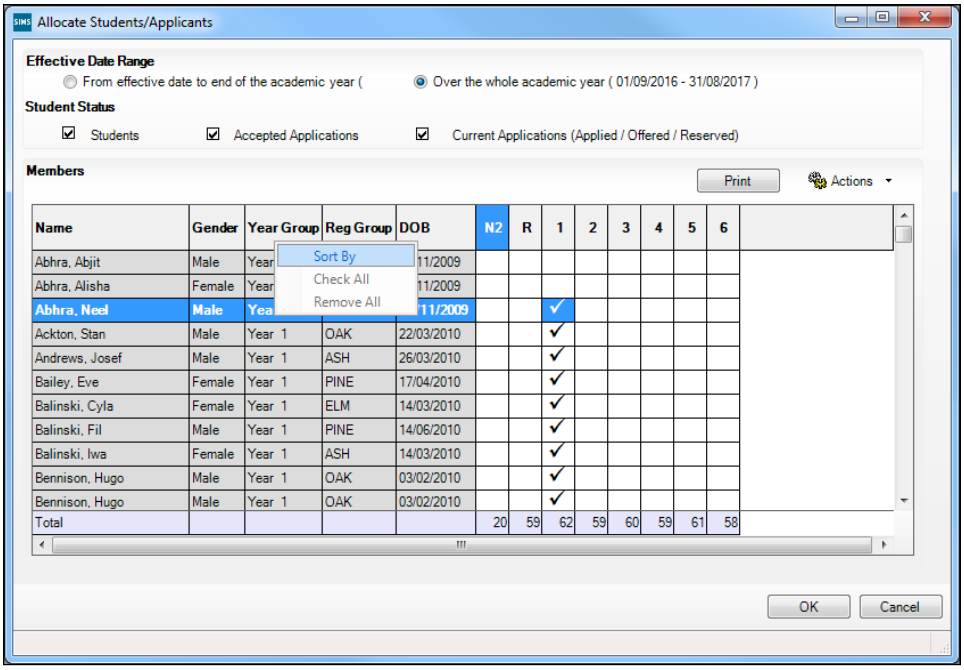
The **Allocate Pupils/Applicants** dialog is displayed.



4. Ensure that the **Effective Date Range** is changed to **Over the whole academic year** by selecting the applicable radio button.

   By default, the records are displayed in alphabetical surname order. Sorting the names in year group order assists in locating pupils who do not have a **Year Taught In** selected.

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



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

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

☐ **Completed**

Checking Home Address Information

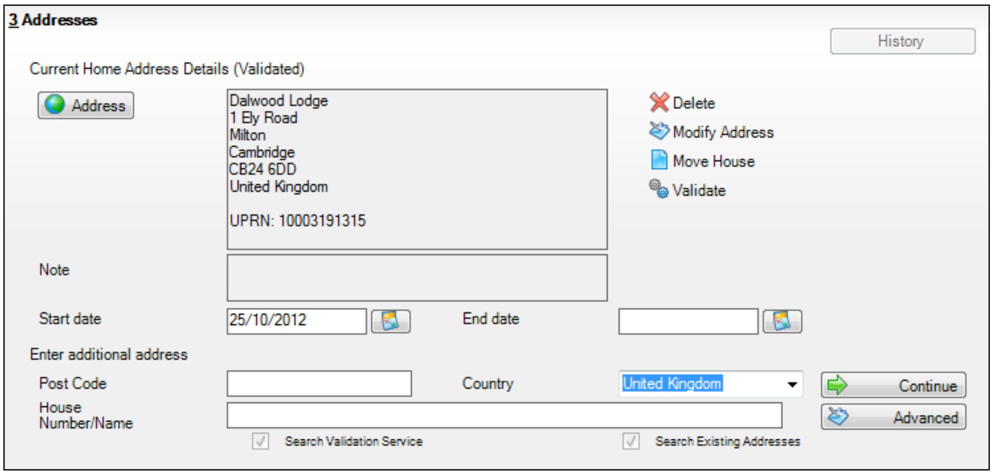
A pupil's current home address is required for the return. Where a pupil has multiple current addresses, details of all addresses should be recorded.

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

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

The Unique Property Reference Number (**UPRN**) for on-roll pupils and leavers is included in the School Census Summer Return for the first time. UPRN a unique identifier (reference number) that links together related address records across different software programmes. This enables organisations to collate and share information based on a common reference number.

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



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

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

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

☐ **Completed**

Checking Free School Meals Eligibility

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

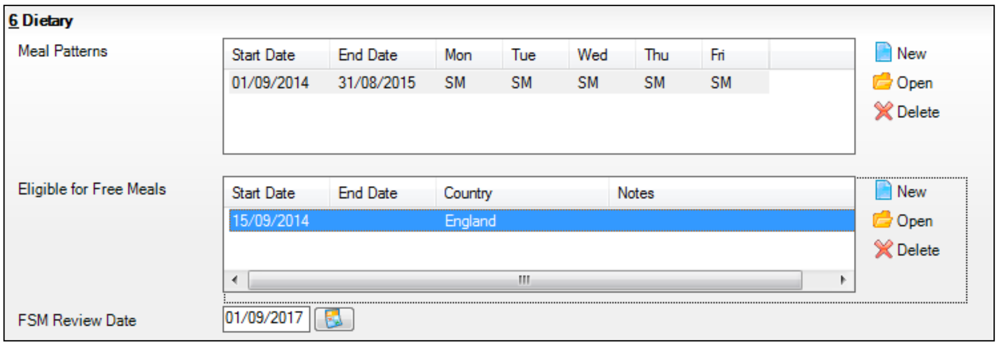
> *NOTE for schools with Reception, Year 1 and Year 2:*
>
> *All pupils in Reception, Year 1 and Year 2 are offered a meal regardless of whether they are eligible for free school meals.*
>
> *Pupils in Reception, Year 1 and Year 2 must only be recorded as eligible for a free school meal if they meet the criteria for free school meals.*

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

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

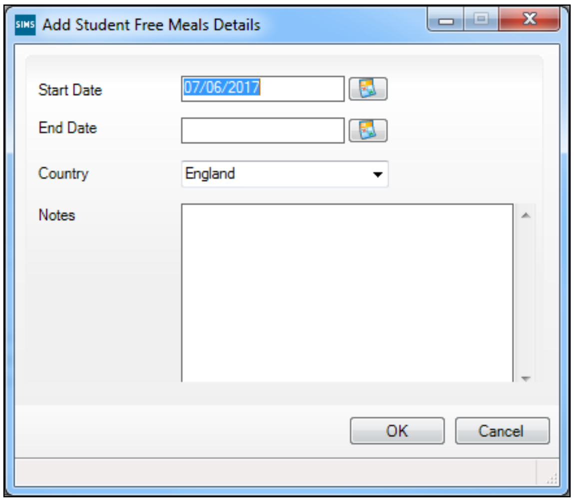
Meal Patterns are not required for the return but can be recorded for information purposes only. It is perfectly acceptable, for example, for a pupil to be eligible for free school meals, but to bring sandwiches (**PL** (packed lunch)) or to go home (**HO** (home)).

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



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

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



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

   Ensure that this information is checked/amended on a regular basis.

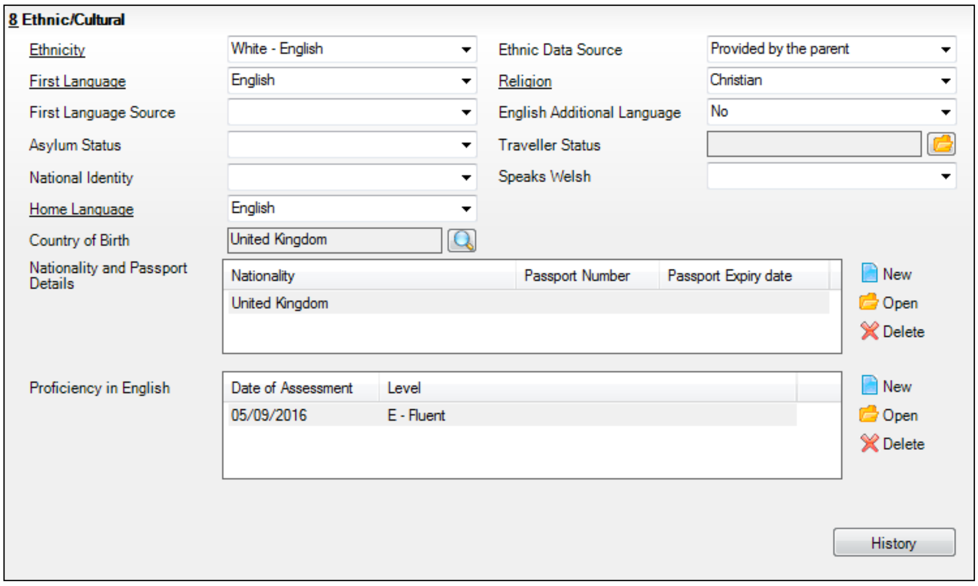
☐ **Completed**

Checking Ethnic and Cultural Information

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

- **First Language**
  - A First Language other than English should be recorded where a pupil was exposed to the language during early development and continues to be exposed to this language at home or in the community.
  - If the child was exposed to more than one language (which may include English) during early development, the language other than English should be recorded, irrespective of the pupil's proficiency in English.
- **Country of Birth** included in the School Census Summer Return for the first time.
- Nationality (**Nation**) included in the School Census Summer Return for the first time.

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



4. Select the pupil's **First Language** from the drop-down list.
5. Select the pupil's **Country of Birth**:
   a. Click the **Browse** button to display the **Nation Browse** dialog.
   b. Highlight the required country then click the **OK** button to return to the **Ethnic/Cultural** panel.

6. If the pupil's Nationality is not recorded:
   a. Click the **New** button adjacent to the **Nationality and Passport Details** section to display the **Add Student Nationality** dialog.
   b. In the **Nation Details** panel, click the **Browse** button to display the **Nation** browser.
   c. Highlight the required nation then click the **OK** button to return to the **Add Student Nationality** dialog.
   d. Enter **Passport Detail**, if known.
   e. Enter **Tier4 Details**, if applicable to your school.
   f. Click the **OK** button to the **Ethnic/Cultural** panel.
7. Click the **Save** button.

TIPS:

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

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

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

☐ **Completed**

Checking Additional Information

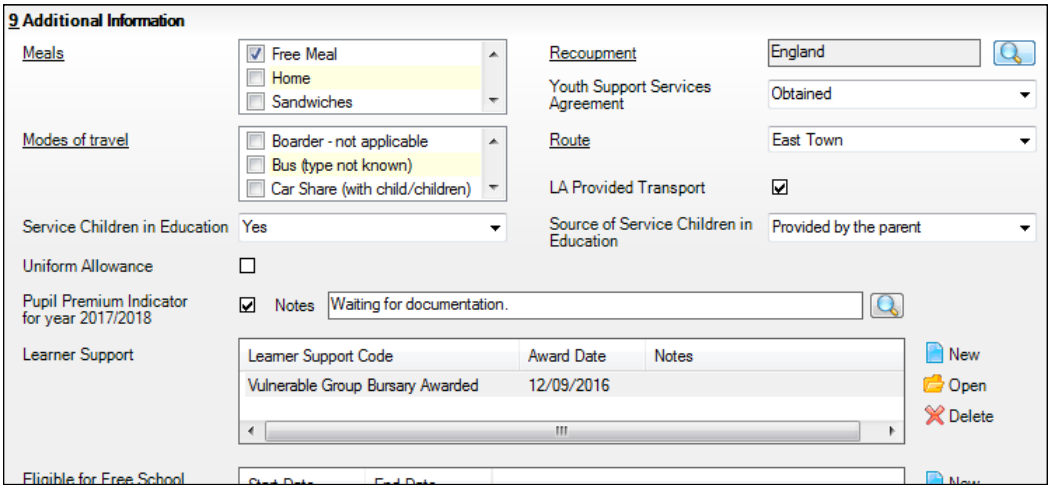
Ensure that the **Youth Support Services Agreement** (YSSA) status is recorded in SIMS.

The YSSA replaces Connexions. It applies to pupils between age 12 and 25 with special educational needs and pupils between age 12 and 20 with no special educational needs.

The Bulk Update routine can be used to assign and edit these values for a specific selection of pupils at the same time, if required (please see *Updating Information Using the Bulk Update Routine* on page *22*).

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

3. Click the **Additional Information** hyperlink to display the **Additional Information** panel.



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

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

> *NOTE: YSSA replaced Connexions Assent.*

5. Ensure that the **Pupil Premium Indicator for year 2017/2018** check box is selected, if applicable. To enter a note related to the applicable year, click the **Search** button adjacent to the **Notes** field.

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

☐ **Completed**

Checking Special Educational Needs Information

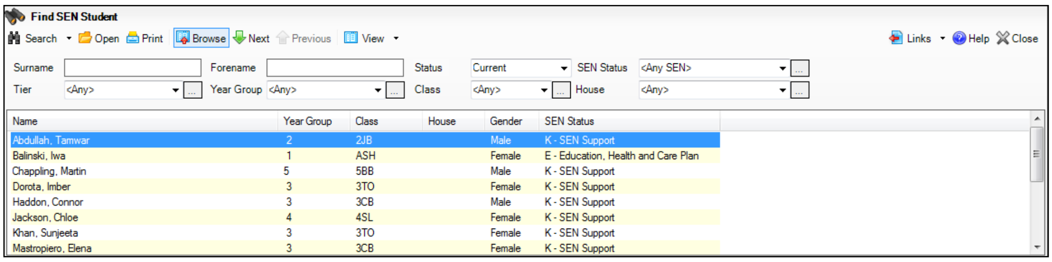
The following Special Educational Needs (SEN) items are collected in the return:

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

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

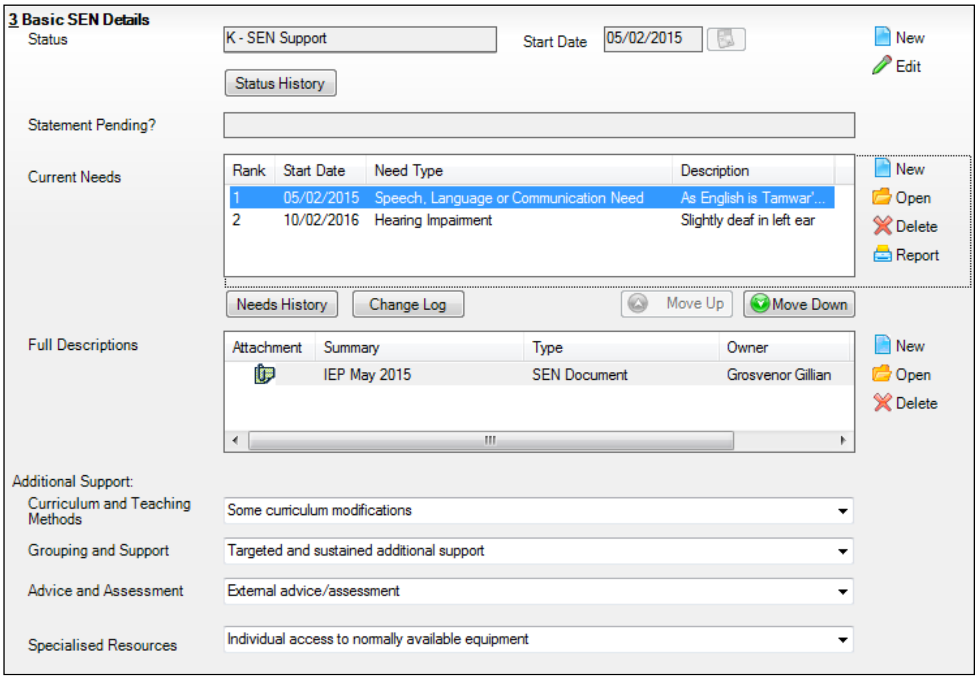
- **Provision Type** Not applicable to Pupil Referral Units or Special schools
  - **Time in SEN Unit** - member of SEN Unit
  - **Resourced Provision**

1. Select **Focus | Pupil | Special Educational Needs** to display the **Find SEN Student** browser.
2. Select the required **SEN Status** from the drop-down list. Additional search criteria can be selected, if required, e.g. **Year Group**.
3. Click the **Search** button to display a list of pupils who match the criteria.



4. Double-click the name of the required pupil to display the **Student SEN details** page.

5. Click the **Basic SEN Details** hyperlink to display the **Basic SEN Details** panel.



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

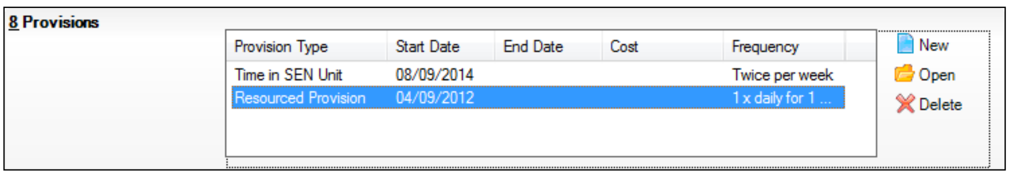
   To amend an error in the current **Status** or **Start Date**, click the **Edit** button. Select the required **Status** from the drop-down list and edit the **Start Date**, if required.

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

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

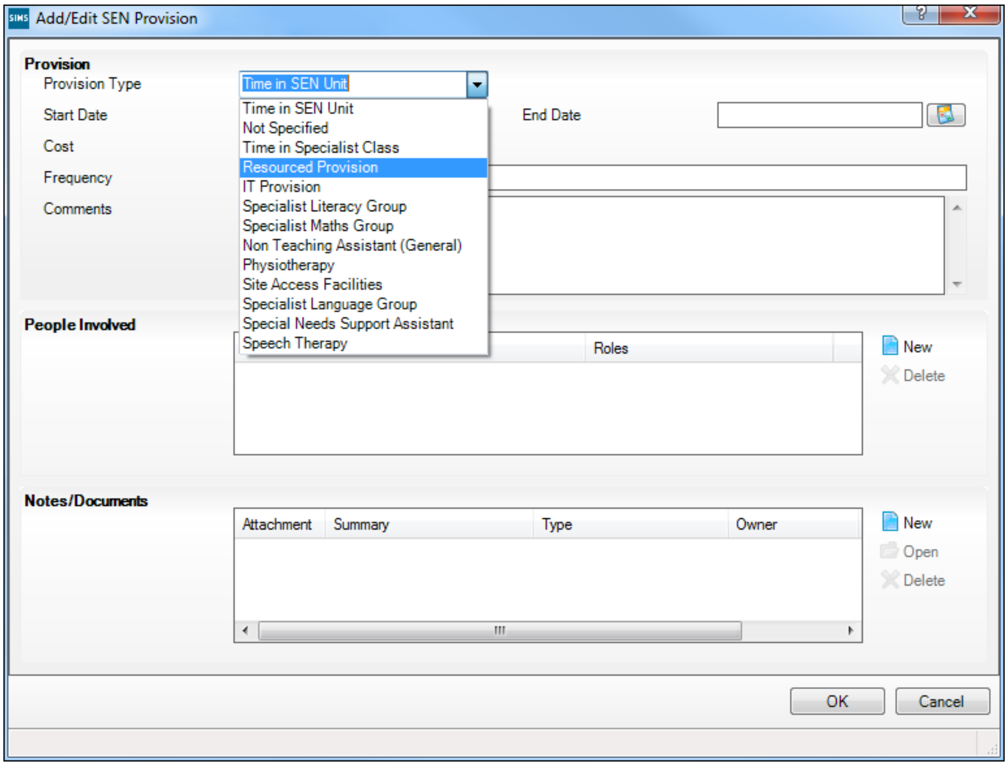
   To view changes that have taken place to the pupil's SEN Status, click the **Status History** button to display the **Status History** page.

7. Click the **Provisions** hyperlink to display the **Provisions** panel.



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

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



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

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

Completed

Preparing Exclusions Information

Not applicable to Nursery schools

Exclusions information is required for pupils who were subject to any exclusion with a start date during the period 01/01/2017 to 16/04/2017 inclusive. Exclusions should not be counted if the Head Teacher withdrew them, or if the pupil was re-instated by the Discipline Committee or an independent Appeal Panel.

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

- Exclusion **Type** (category, e.g. fixed period, lunchtime or permanent).
- Exclusion **Reason** (select one code to provide the main reason).

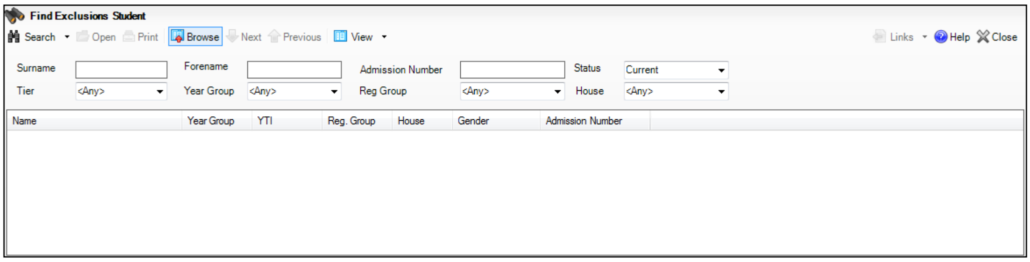
- Exclusion **Start Date**.
- Actual number of sessions (**Length**) - required for fixed period and lunchtime exclusions.
- SEN Provision (please see *Checking Special Educational Needs Information* on page *49*).

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

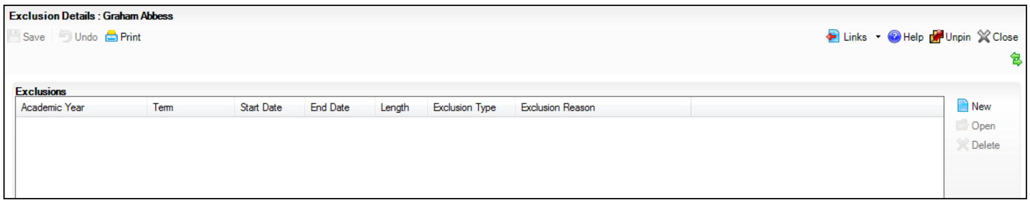
- *SEN Status (if applicable)*
- *Ethnicity*
- *Ethnic Source*
- *Part-time indicator (if applicable)*
- *Date of Admission.*

Recording an Exclusion

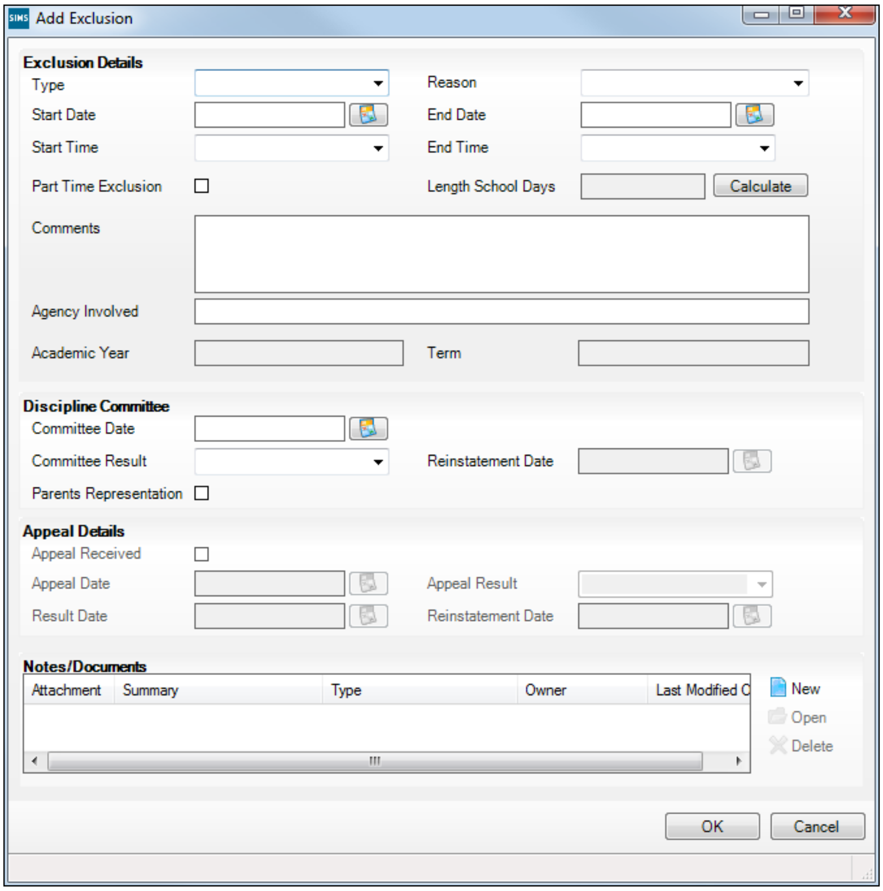
1. Select **Focus | Pupil | Exclusions** to display the **Find Exclusions Student** browser.



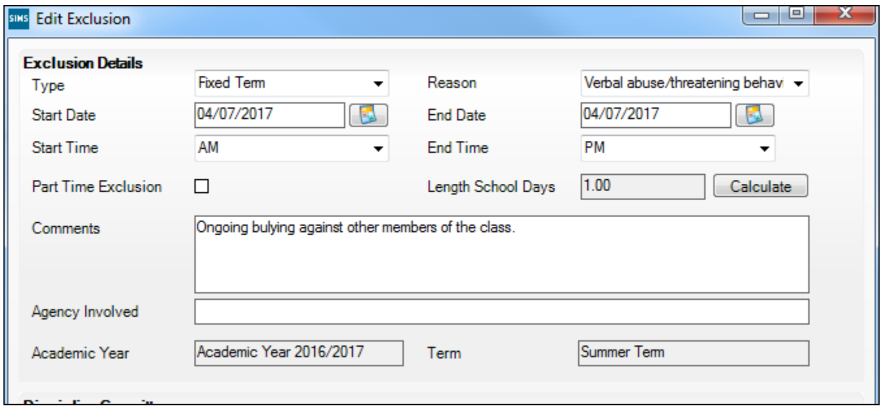
2. Search for then select the required pupil to display the **Exclusion Details** page.



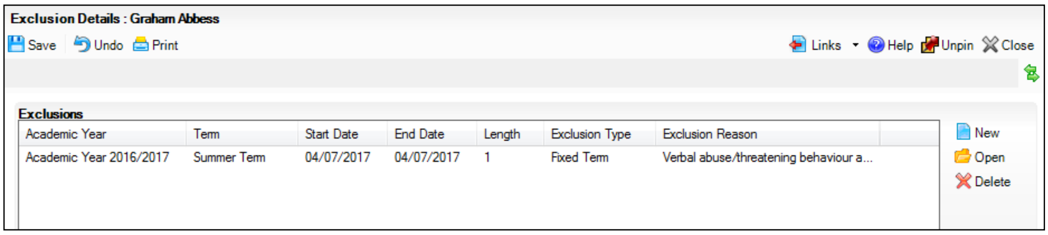
3. Click the **New** button adjacent to the **Exclusions** panel to display the **Add Exclusion** dialog.



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



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



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

9. Click the **Save** button to save the exclusion.

   For more information about exclusions, please refer to the DfE website (http://www.education.gov.uk/schools/pupilsupport/behaviour/exclusion).

☐ **Completed**

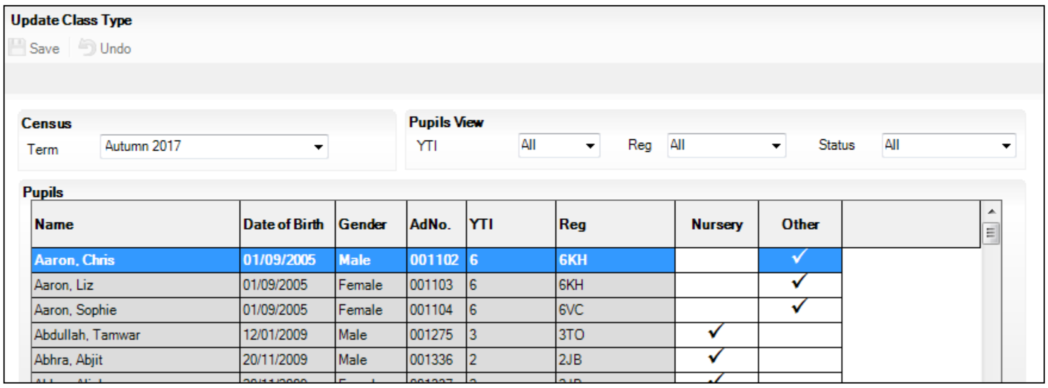
Updating Class Types

Applicable to Primary schools only

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

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

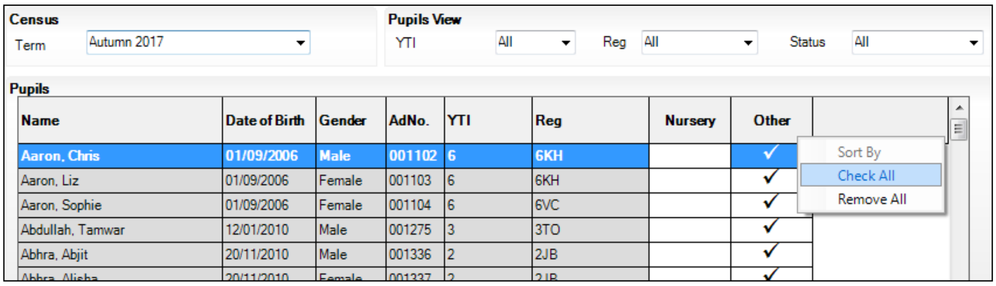
1. Select **Tools | Statutory Return Tools | Update Class Type** to display the **Update Class Type** page.



2. To specify the class type for an individual pupil, click in the applicable cell of the **Nursery** or **Other** column to enter a tick. Clicking the cell again removes the tick.

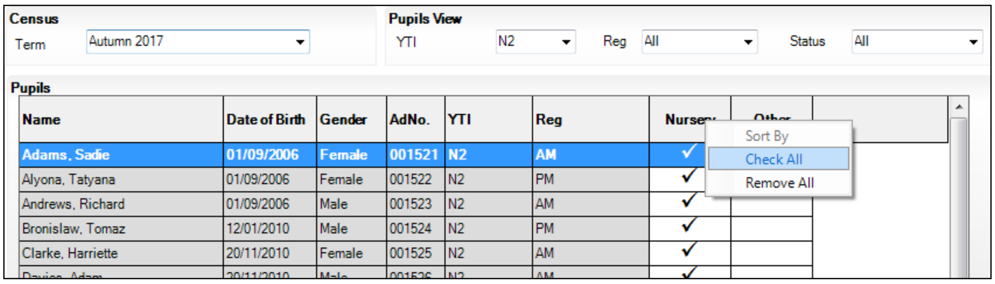
3. If all or the majority of pupils need to be assigned the same class type, the following method can be used to quickly populate the **Nursery** and **Other** columns:

   a. Right-click the **Other** column header then select **Check All**.



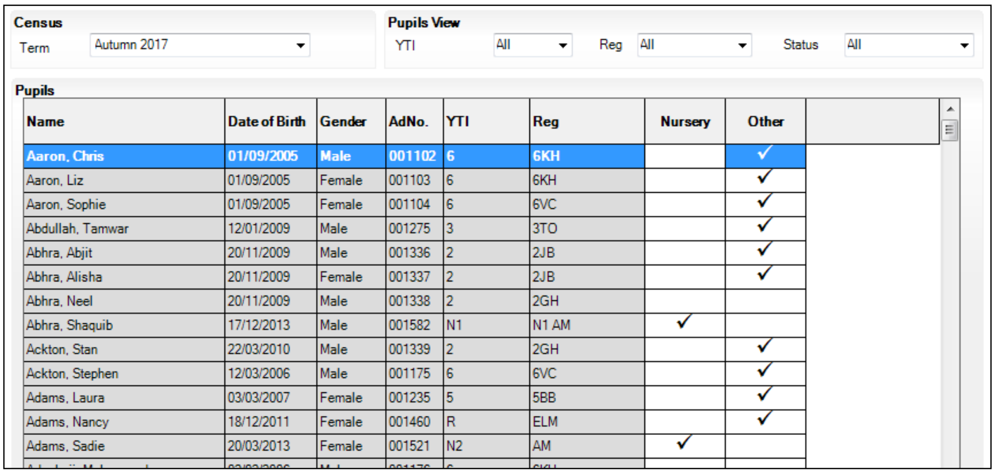
   b. In the **Pupils View** panel, select, for example, Year **N2** from the year taught in (**YTI**) drop-down list. Only Year **N2** pupils are displayed in the **Pupils** panel.

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



   d. Repeat steps *b* and *c* for any additional Nursery classes.

   e. To check your selections, select **All** from the **YTI** drop-down list.



4. Click the **Save** button.

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

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

Resetting All Class Types

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

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

Identifying which Pupils have no Class Type Specified

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

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

☐ **Completed**

Preparing Termly Attendance Information

Termly attendance data (including attendance codes and the number of sessions missed) should be provided for non-boarder pupil/students and leavers aged four to 15 inclusive on 31/08/2016, who were on-roll for at least one session during the collection period from 17/04/2017 to 31/07/2017.

The attendance data collected in this return includes:

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

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

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

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

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

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

Additional Resources:

Producing the School Census Autumn 2017 Return handbook
Managing Pupil/Student Attendance handbook (SIMS Attendance users)
Monitoring Session and Lesson Attendance handbook (SIMS Lesson Monitor users)

☐ **Completed**

Recording Universal Infant School Meals

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

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

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

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

- If default meal patterns have been entered (via **Focus | Dinner Money | Pupil Default Meal Patterns**), the Dinner Register is populated automatically with the default meals.

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

The attendance data recorded for census day morning can be used to calculate all pupils who are present and are likely to be taking a school dinner. Therefore, when completing the School Census **School Dinner Taken** panel, the calculated numbers must be edited to reflect hot meals provided by the school only. Ensure that the pupils listed on the Reception, Year 1 and Year 2 attendance registers are accurate and that the registers are taken on census day morning (before completing the School Census **School Dinner Taken** panel).

Updating Early Years Data

Applicable to schools with Early Years children only

Early Years data is collected from all schools that have early years pupils on-roll on census day. The following items are collected:

- Funded Hours
- Hours at Setting
- Disability Access Fund
- 30 Hour Code
- Extended Funded Hours.

Funded Hours and Hours at Setting

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

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

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

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

Disability Access Fund

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

- In receipt of child Disability Living Allowance (DLA)

  and
- accessing their entitlement to free early learning and childcare, e.g. funded hours.

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

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

Extended Funded Hours and 30 Hour Code

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

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

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

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

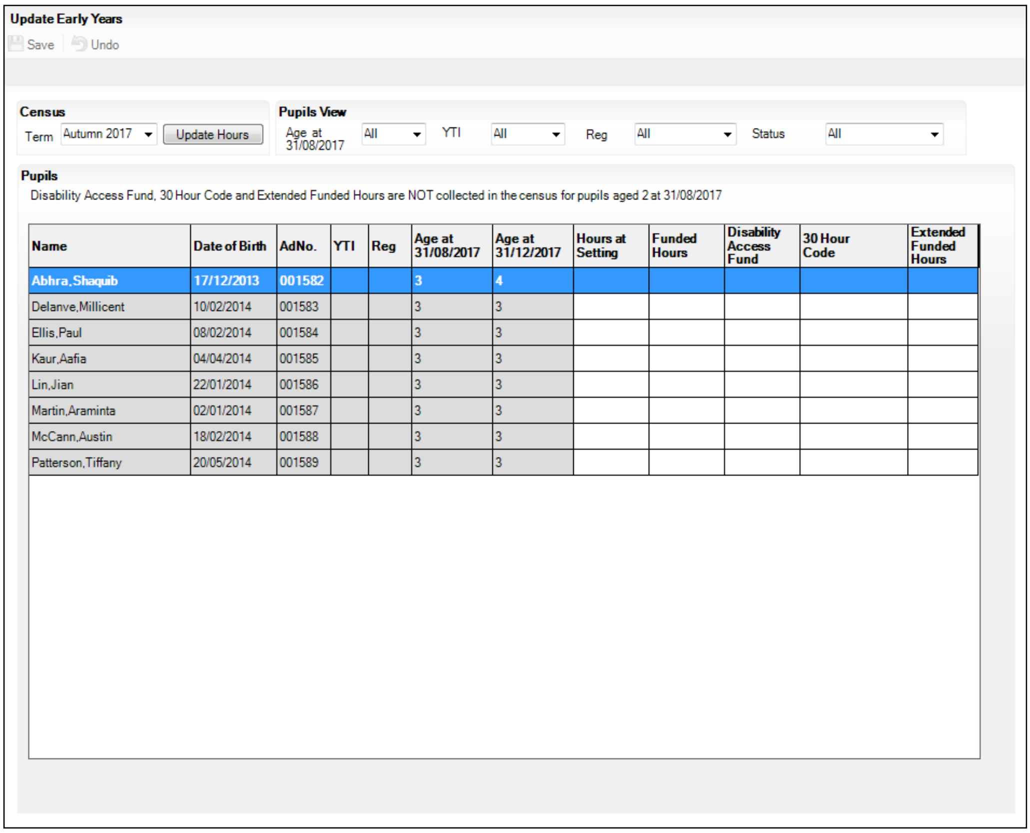
The 11 digit **30 Hour Code** and the number of extended funded hours are collected in this return for the week in which the census day falls.

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

Extended Funded Hours information provided by the DfE can be found on their website https://www.gov.uk/government/publications/30-hours-free-childcare-la-and-early-years-provider-guide.

Checking Early Years Data

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



Name	Date of Birth	AdNo.	YTI	Reg	Age at 31/08/2017	Age at 31/12/2017	Hours at Setting	Funded Hours	Disability Access Fund	30 Hour Code	Extended Funded Hours
Abhra,Shaquib	17/12/2013	001582			3	4					
Delanve,Millicent	10/02/2014	001583			3	3					
Ellis,Paul	08/02/2014	001584			3	3					
Kaur,Aafia	04/04/2014	001585			3	3					
Lin,Jian	22/01/2014	001586			3	3					
Martin,Araminta	02/01/2014	001587			3	3					
McCann,Austin	18/02/2014	001588			3	3					
Patterson,Tiffany	20/05/2014	001589			3	3					

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

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

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

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

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

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

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

      This number is then entered automatically for the remaining pupils.
   d. Click to the right of the grid to deselect all.
   e. Edit the entry for each pupil who is receiving a different number of hours. This is achieved by highlighting the required pupil, clicking in the associated **Hours at Setting**, **Funded Hours** or **Extended Funded Hours** cell, as applicable and then entering the required number.
5. Indicate whether the pupils are in receipt of the Disability Access Fund. Click the applicable cell then select Yes or No from the drop-down list.
6. Enter the 11 digit 30 Hour Code, e.g. 50000000000, in the applicable cell, if in receipt of extended funded hours.
7. Click the **Save** button.

   The Early Years report is available from the **Detail Report** drop-down list via **Routines | Statutory Returns | School Census**.

☐ **Completed**

Identifying which Children have no Hours Recorded

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

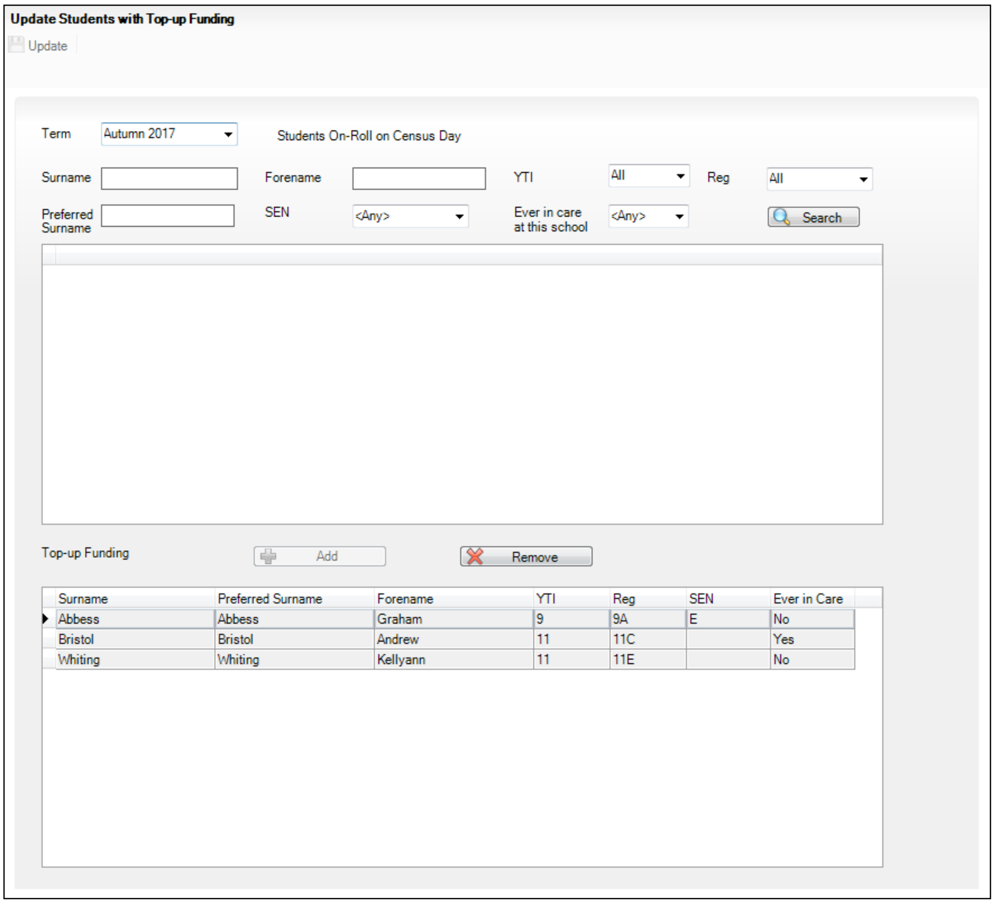
   Only pupils who do not have an entry for **Hours at Setting** (or **Funded Hours**) are displayed.
3. Enter the required values for these pupils as described previously.
4. Click the **Save** button.

Updating Pupils with Top-Up Funding

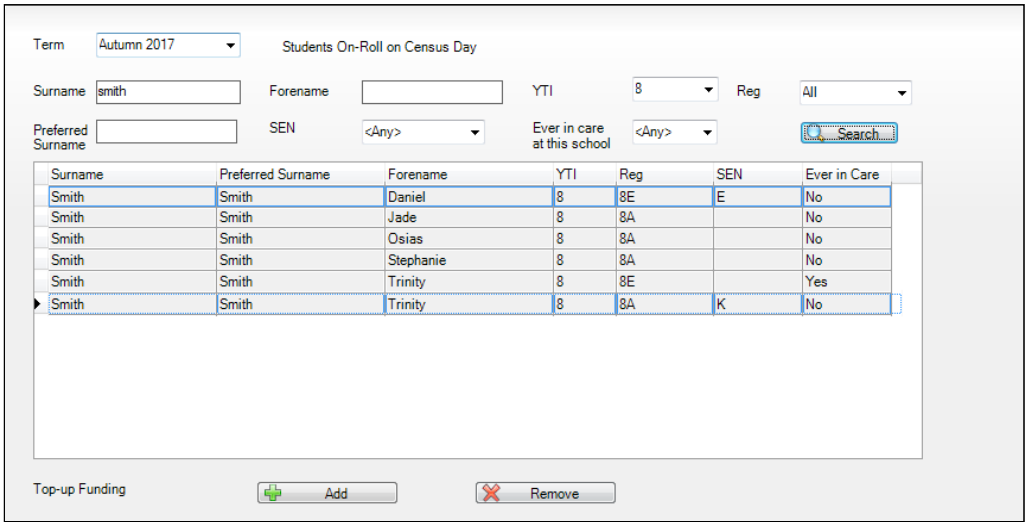
Top-up funding is supplied to schools, in most cases by the Local Authority, to meet the additional costs of support for high needs pupils.

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

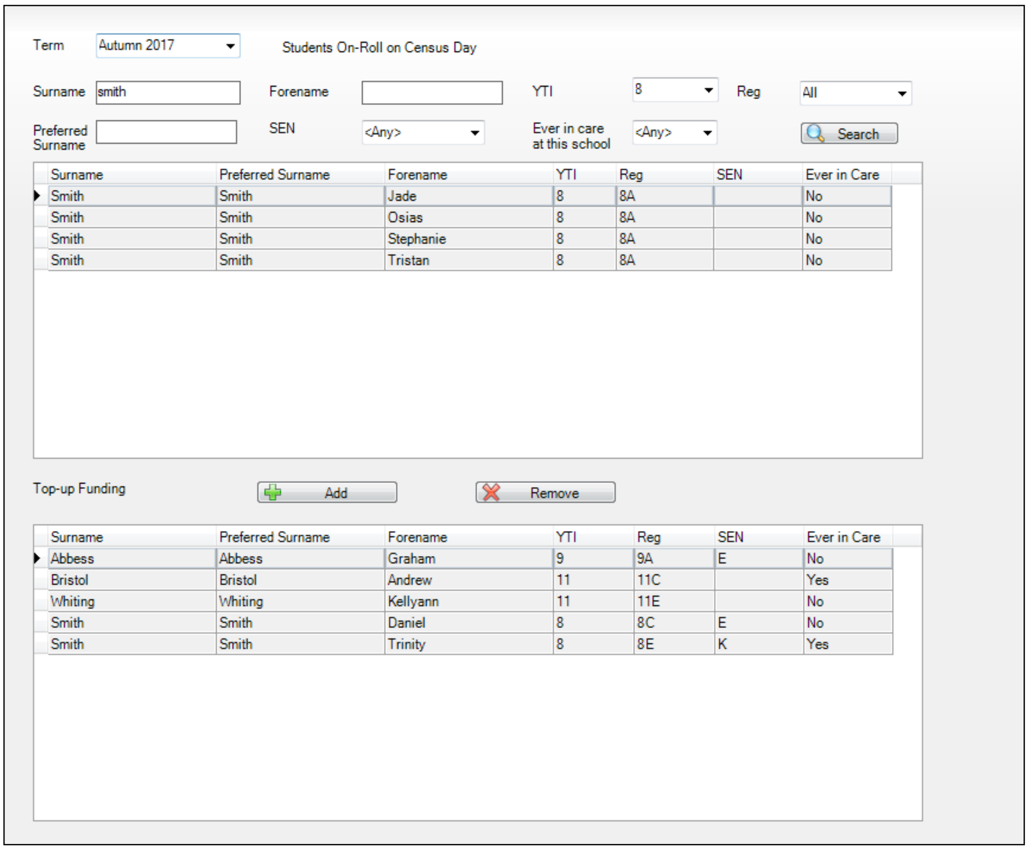
   Any pupils currently recorded as having top-up funding are displayed in the **Top-up Funding** list (located in the bottom half of the page).



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



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



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

☐ **Completed**

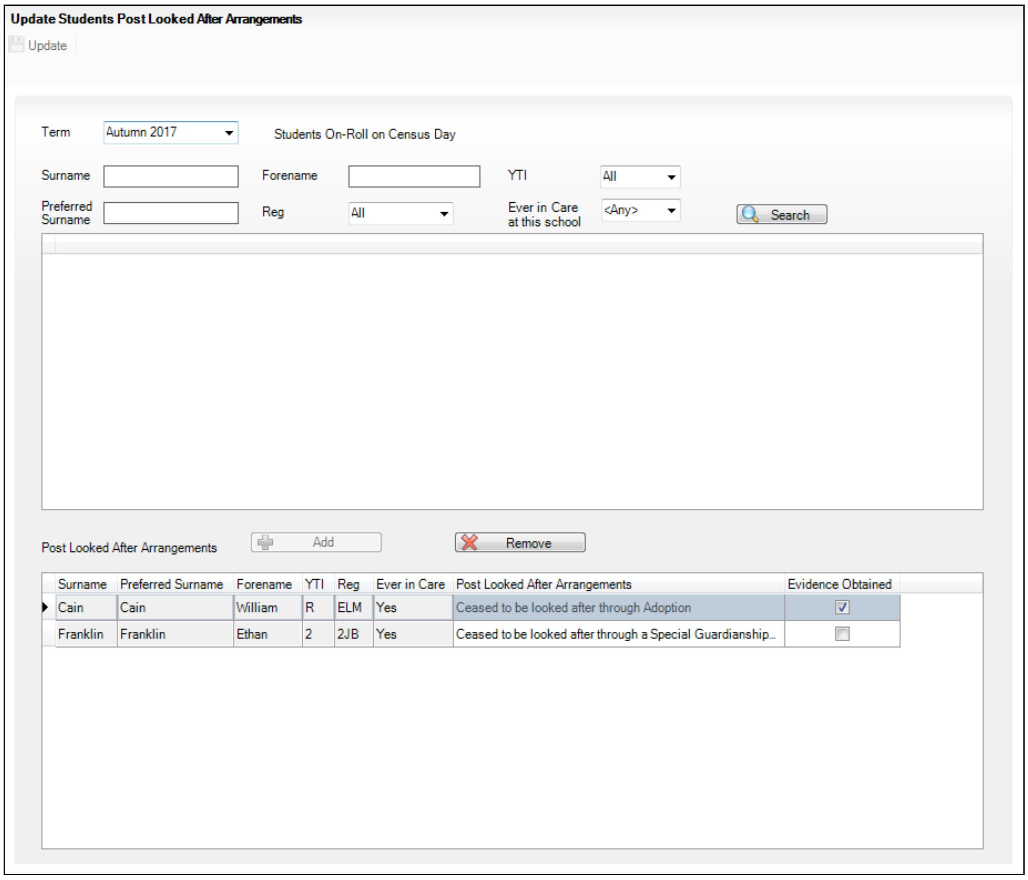
Updating Pupils Post Looked After Arrangements

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

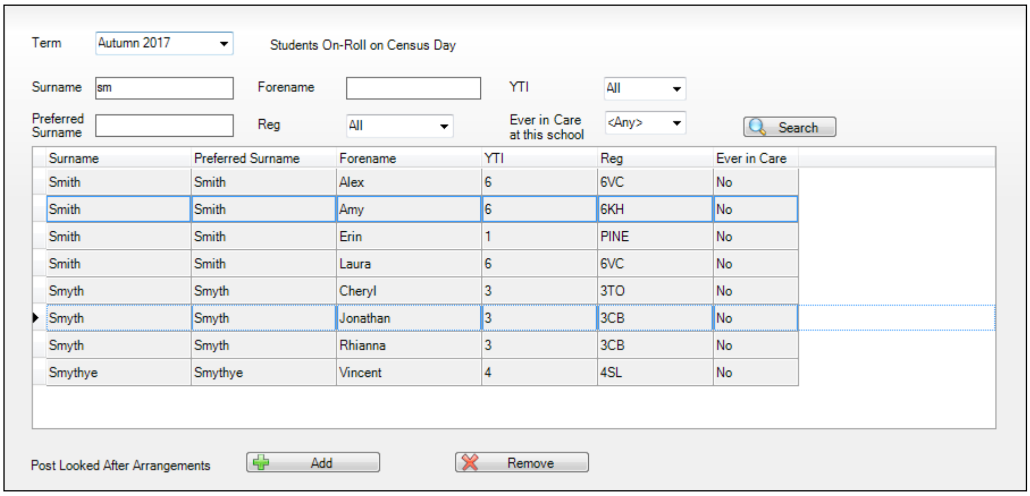
The values available for selection enable schools to indicated which pupils were looked after immediately before adoption or prior to being the subject of a residence or special guardianship order. However, those who have parental responsibility are not obliged to provide this information to the school.

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

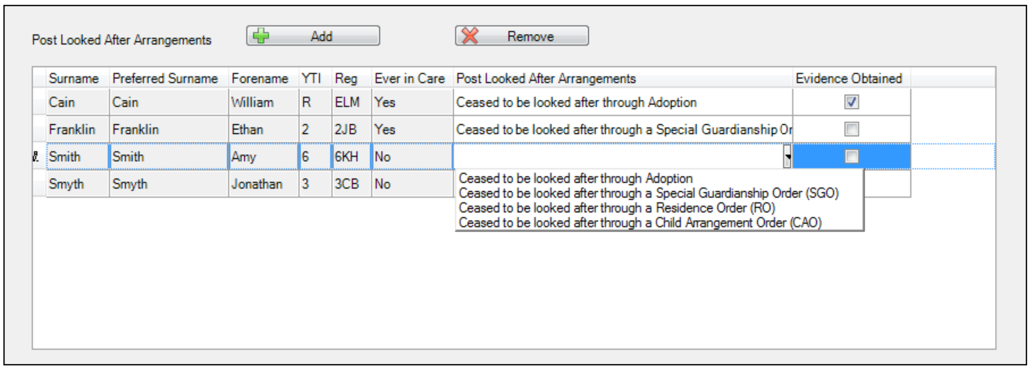
Any pupils currently recorded as having post looked after arrangements are displayed in the **Post Looked After Arrangements** list (located in the bottom half of the page).



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



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



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

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

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

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

☐ **Completed**

05 | What Next?

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

You must upgrade to the SIMS 2017 Summer Release (7.176) before completing the School Census Autumn 2017 Return. However, it is advisable to check whether a later version of SIMS is available and then upgrade to the current release, if necessary.

You should now be ready to produce the final School Census Autumn 2017 Return. For specific instructions, please refer to the *Producing the School Census Autumn 2017 Return* handbook applicable to your school, i.e. Primary/Middle deemed Primary, Nursery, Special, etc.

Where Can I Get More Information?

In addition to this preparation guide, the following information is also available:

- *Producing the School Census Autumn 2017 Return (English Primary/Middle deemed Primary Schools)* handbook
  This handbook outlines the School Census process in SIMS for Primary and Middle deemed Primary schools.
- *Producing the School Census Autumn 2017 Return (English Nursery Schools)* handbook
  This handbook outlines the School Census process in SIMS for Nursery schools.
- *Producing the School Census Autumn 2017 Return (English Special Schools)* handbook
  This handbook outlines the School Census process in SIMS for Special schools.
- *Producing the School Census Autumn 2017 Return (English All-Through Schools)* handbook
  This handbook outlines the School Census process in SIMS for All-Through schools.
- *Producing the School Census Autumn 2017 Return (English Pupil Referral Units)* handbook
  This handbook outlines the School Census process in SIMS for Pupil Referral Units.
- *School Census Academic Year 2017/2018 Validation Errors and Resolutions* document
  This guide provides suggestions on how to resolve any validation errors or queries.
- *Managing Pupil/Students* handbook
  This handbook provides details about the processes that relate to the management of pupil data in SIMS.

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

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

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

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

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

The search results are displayed automatically.

Tips for using the My Account Search Facility

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

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

  For example: `“end of year procedures” +primary +detailed`

Problem Solving

The My Account website also includes:

- **Notification** (the latest news to keep you up to date and informed)
- **Hot Topics** (a collection of articles from our **Knowledge Base** and other resources surrounding popular topical subjects such as preparing for the new school year)
- The **Knowledge Base** (a library of helpful articles produced by our customer service desks).

IMPORTANT NOTE: *If you receive support from a local authority or third party support team, check with them before using any of the solutions.*

Index

School Business Services

Contact the Service Desk today on

0345 222 1551 • option 3

or email us on

misservicedesk@schoolbusinessservices.co.uk