



# Producing the School Census Spring Return Handbook

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English Secondary & Middle  
deemed Secondary Schools



**SIMS** helping  
schools  
inspire  
Accredited Support

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# 01 | Introduction

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## Overview

This handbook provides the information needed by Secondary schools, Middle deemed Secondary schools and Academies with Secondary phase in England to complete the School Census Spring 2019 Return, which takes place on Thursday 17 January 2019.

The School Census Spring 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 student details, e.g. student address, free school meals, exclusions, etc. Different data is collected depending on which return is being prepared and your school phase.

A list of items collected from Secondary/Middle deemed Secondary schools in England for the School Census Spring 2019 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.*



### More Information:

*Preparing Data for the School Census Return* on page 6

## How has the School Census Spring Return Changed?

Changes to the School Census Spring Return include the following:

- Census date 17/01/2019
- Attendance collected from the start of the 2018 Autumn term to 31/12/2018

The **Attendance collected from** date (located in the **Census Details** panel) is now read-only and displays the start date of the Autumn term as recorded in the School Diary (via **Focus | School | School Diary**).

- Exclusions collected from 02/04/2018 to 31/08/2018
- Free School Meal Eligibility collected from 05/10/2018 to 17/01/2019
- Learner Support collected from 01/08/2018 to 17/01/2019.

### Removal of Alternative Provision Placement

Information relating to Alternative Provision Placements has been removed from the return because the data is currently not required by the DfE.

### Report Changes

Changes to the School Census reports include the following:

- Proficiency in English information has been removed from the On-Roll Basic Details report because the information is no longer required by the DfE.
- The Absentees report is now based on students who have an absence rate of 10% or above. Previously, the report was based on students who had missed 14 sessions.
- The SEN status S (Statement) has been removed from the SEN detail report header. This SEN status is no longer valid and therefore is not collected in the return.
- The AP Placements report has been removed from the return because Alternative Provision Placement information is not required by the DfE.



#### **More Information:**

*Producing Detail Reports on page 38*

## Where to Find More Information

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

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

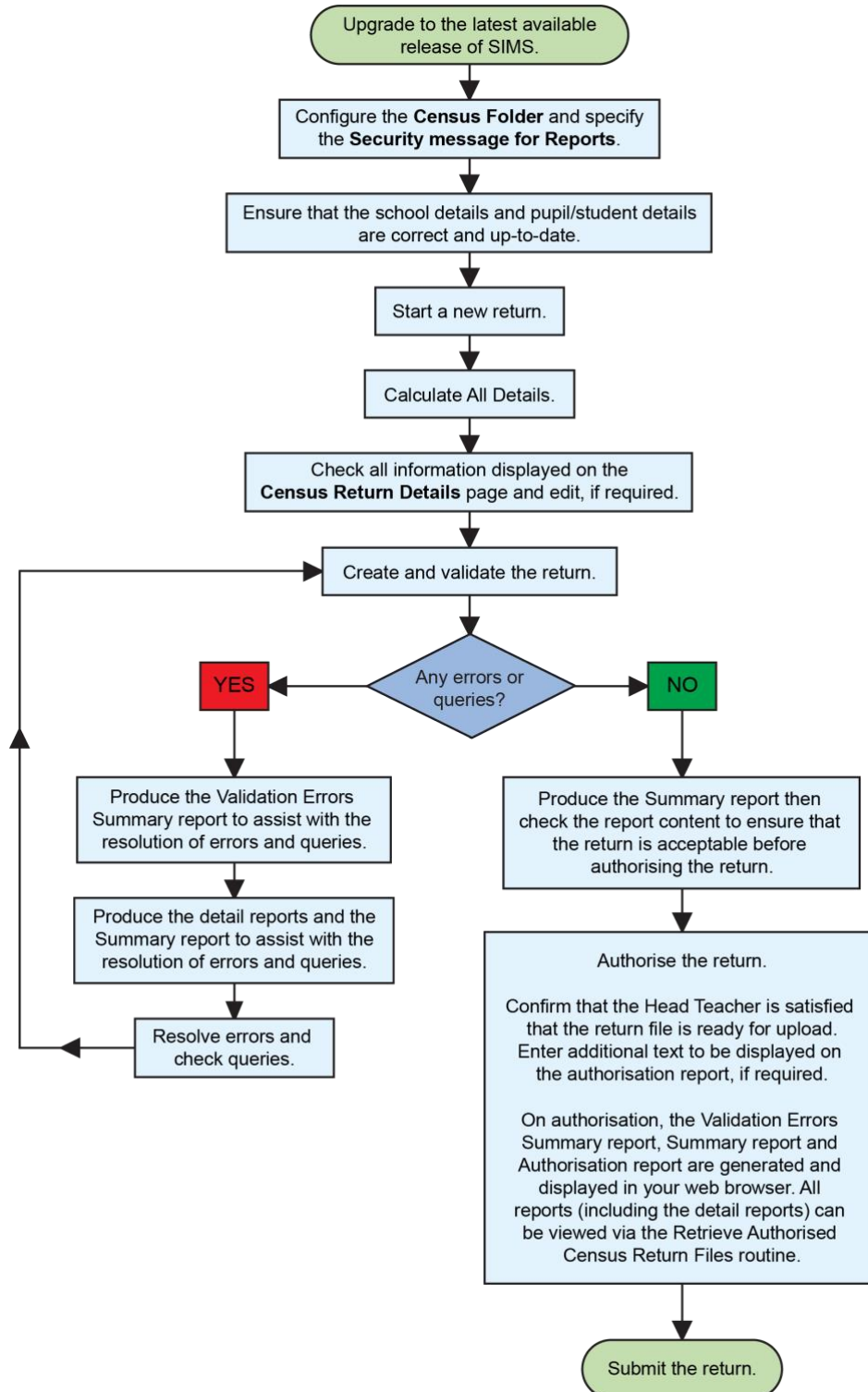
1. Enter the required text in the **Search** field to display a list of documents that match the search criteria.
2. To refine the search further, click **Documents** and then select the required **Document type**, **File type** and/or **Date** range (click **Show more** to view additional options, if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

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

The search results are displayed automatically.

## 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.



# 02 | Preparing for the School Census Spring Return

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## Setting Permissions

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

### Running the Return

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

### Editing and Preparing Data

Users who edit and prepare data must have permissions to access additional areas of SIMS, e.g. student details, school details, etc. These users must be a member of the user groups applicable to the areas they are editing (please see *Where to find More Information about Permissions* on page 5).

### 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 2018 Autumn Release (7.184) 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.



## 02| Preparing for the School Census Spring Return

The version should read 7.184 or later.



## Preparing Data for the School Census Return

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

The following information is collected from Secondary/Middle deemed Secondary schools for the School Census Spring 2019 Return.

### School Level Data

- School Characteristics: LA number, DfE establishment number, school name, school phase, school type, highest and lowest national curriculum year, intake type, governance, school email address and school telephone number.
- Secondary Admissions Appeals: lodged, withdrawn, heard by independent admissions committee, upheld (decided in parents' favour) and rejected.
- Student Reconciliation: part-time students not at school, private study students, students at another school, students on work experience and students at Further Education colleges.
- Class Information: class name, number of teachers in class, number of adult non-teachers in class, class year group, number of students from the host school in the class and number of students from other schools in the class.
- Miscellaneous:
  - free school meals taken
  - childcare provision on site, signposted off site childcare provision, type of childcare (e.g. before school, after school, etc.), opening time and closing time, number of childcare places, childcare provider, other schools and number of weeks that the childcare provision is open.

### Student Level Data

- Student Identifiers: unique pupil number (UPN) and former UPN, unique learner number (ULN), surname, forename, middle names, former surname, preferred surname, gender and date of birth.
- Student Characteristics:

- ethnicity, first language
- free school meal eligibility start date and end date, UK country in which the eligibility applies
- school dinner taken (**applicable to schools with students in Reception, Year 1 and Year 2**)
- Youth Support Services Agreement (YSSA) indicator, post looked after arrangements
- service children in education indicator
- learner support code, top-up funding indicator
- funded hours, hours at setting (**applicable to schools with students of the applicable age**).
- Student Status: enrolment status, date of entry, date of leaving, part-time indicator, boarder indicator and actual national curriculum year group.
- Special Educational Needs: SEN provision, SEN type ranking and SEN type for each SEN need, member of SEN unit (sometimes called special class) indicator, member of resourced provision indicator.
- Termly Exclusion Information (02/04/2018 to 31/08/2018): exclusion category, reason for exclusion, exclusion start date, actual number of sessions the student was excluded from and SEN provision (formerly stage).
- Student Home Address: student's home address details, including post code and unique property reference number (UPRN).
- Termly Attendance Information (from the start of the 2018 Autumn term to 31/12/2018): possible sessions, sessions missed due to authorised absence, sessions missed due to unauthorised absence, attendance codes (reason for absence) 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 applicable *Preparing for the School Census Spring 2019* 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**)

To access the School Census documents, please search for CENSUS19 in the SIMS **Documentation Centre**

# 03 | Producing the School Census Spring Return

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## Creating a New School Census Return

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

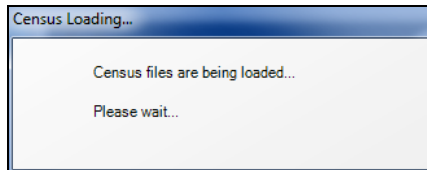
The School Census Spring 2019 Return collects data for:

- all students on the register on 17/01/2019 (census day).
- any additional students not on-roll on census day who:
  - were on-roll for at least one session during the collection period from the start of the 2018 Autumn term to 31/12/2018.
  - had an exclusion that started between 02/04/2018 (Easter Monday) and 31/08/2018.
  - were awarded Learner Support funding from 01/08/2018 to 17/01/2019.

It is possible to create more than one return. This enables you to carry out dry runs to determine what data needs to be added or updated. Any unwanted returns can be deleted, providing they have not been authorised (please see *Deleting an Unauthorised Return* on page 52).

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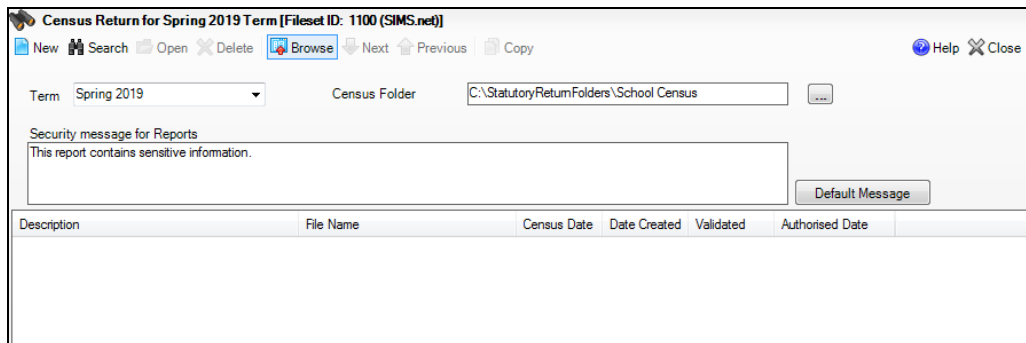
1. Select **Routines | Statutory Returns | School Census** to load the School Census validation and reporting files.



**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 for Spring 2019 Term** browser is displayed.

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 **Spring 2019**.

2. Ensure that the **Census Folder** is configured correctly and that the required **Security message for Reports** is specified before creating a **New** return, as described in the following sections.

## 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.

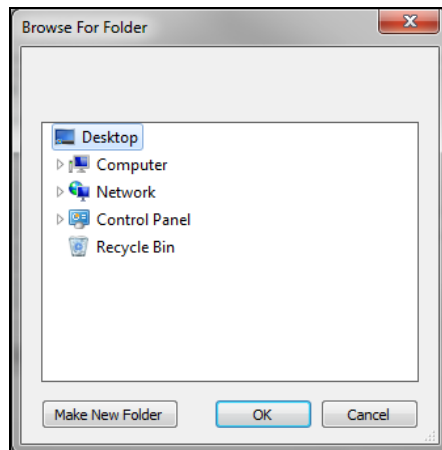
*The General Data Protection Regulation (GDPR), which replaces the Data Protection Act 1998, is a directive for certain safeguards regarding the use of personal data. It is important that schools process all data (not just the data collected for the school census) in accordance with the full requirements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

- The census date is displayed as 17/01/2019.
- Attendance data collected from the start of the Autumn term to 31/12/2018.  
The **Attendance collected from** date displays the start date of the Autumn term as recorded in the School Diary (via **Focus | School | School Diary**).
- Exclusions data collected from 02/04/2018 to 31/08/2018.
- FSM (Free School Meal) data collected from 05/10/2018 to 17/01/2019.
- Learner Support collected from 01/08/2018 to 17/01/2019.

| 1 Census Details               |                           |                              |            |
|--------------------------------|---------------------------|------------------------------|------------|
| Census Date                    | 17/01/2019                |                              |            |
| Description                    | School Census Spring 2019 |                              |            |
| Attendance collected from      | 01/09/2018                | Attendance collected to      | 31/12/2018 |
| Exclusions collected from      | 02/04/2018                | Exclusions collected to      | 31/08/2018 |
| FSM collected from             | 05/10/2018                | FSM collected to             | 17/01/2019 |
| Learner Support collected from | 01/08/2018                | Learner Support collected to | 17/01/2019 |

By default, the return **Description** is displayed as **School Census Spring 2019**.

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

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

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

2. Check the **Attendance collected from** date. The date displayed defaults to the possible start of the Autumn term. This date can be edited if the start of your school's Autumn term is different.

## Specifying the Selected Period on Census Day

The selected period on the census day is used in conjunction with the class information collected in the return. It is based on the last digit of the DfE establishment number and is the period on census day (as defined by the DfE) when your school should run the return.

*NOTE: These times move down by one each year, i.e. a school using 'one hour before the end of morning school' last year will use 'one hour after the start of morning school' this year.*

For more information about the selected period on census day, please refer to the *School census 2018 to 2019 Guide* (available via the School census autumn 2018 to summer 2019: guide for schools and LAs link) on the DfE website

(<https://www.gov.uk/government/publications/school-census-2018-to-2019-guide-for-schools-and-las>).

By default, the lowest year on your school's timetable is displayed as the year taught in (YTI) when the timetable classes begin.

1. If the required **Reference Date** is different to that displayed (e.g. because the school is closed on census day due to severe weather conditions), enter an alternative date or select a date from the Calendar.
2. Ensure that the lowest year that you want to report as being on the timetable is displayed in the **YTI when timetabled classes begin** field. Select a different YTI from the drop-down list, if required.

Students in curriculum year groups below that displayed are assumed to be taught in non-timetabled classes, i.e. registration groups.

3. Select the **Selected Period** from the **Period Name** drop-down list. This is the period on census day that your school should run the return, as defined by the DfE.

*NOTE: The **Selected Period** must be specified before you can **Calculate All Details**.*

4. If you want to **Include Alternative Curriculum** periods in the **Classes** panel, select the associated check box.
5. Click the **Calculate All Details** button.

## Calculating All Details

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

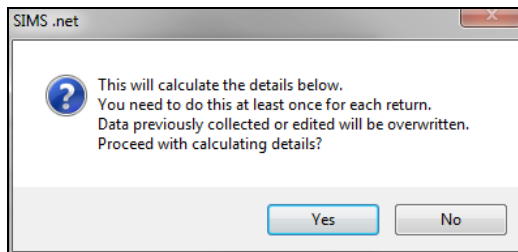
**IMPORTANT NOTE:** You must calculate all details at least once to populate the various panels for each return.

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

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

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

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



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

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

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



## Editing School Information

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

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

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.

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

## Information for Academies

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

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

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

## Editing School Childcare Details

School childcare details are collected annually in the School Census Spring return.

Details can be entered via **Focus | School | School Details**, enabling the information to be maintained at any time throughout the year.

The **Childcare** panel (on the **Census Return Details** page) displays read-only childcare provision information that has been entered previously via School Details. Additional information can be added or existing data edited by clicking the **Edit** button. This provides a direct link to the **School Details** page.

If no childcare information is recorded, a validation error is triggered when the return is run.

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

1. Click the **Edit** button in the **Childcare** panel to display the **School Details** page.

**School Detail - Green Abbey School**

1 Establishment 2 Address 3 Contact Details 4 Sites 5 Documents 6 Childcare

**1 Establishment**

School Name: Green Abbey School

LA: 823 Central Bedfordshire

Establishment Number: 4321

Unique Reference Number: 012345

UK Provider Reference Number: [Empty]

School Phase: Secondary

School Type: Comprehensive all-through 11-18

School Governance: Community

Intake Type: Comprehensive

Previous School Name: [Empty]

Previous Estab Number: [Empty]

Previous URN Number: [Empty]

Boarding Pupils:  Nursery Class

Head Teacher: Mr Adrian Blacker

Main Contact: Mr Adrian Blacker

Date Name Changed: [Empty]

Earliest DOA: [Empty]

Date Number Changed: [Empty]

Special Class or Unit:

2. Click the **Childcare** hyperlink to display the **Childcare** panel, where the current childcare details are displayed.

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

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

The screenshot shows a window titled "Update Childcare Details" with a "Childcare Details" section. The fields are as follows:

- Type: Before School Childcare
- On Site: Yes
- Signposted: No
- Opening Time: 07 : 00 hh:mm (24 hrs)
- Closing Time: : hh:mm (24 hrs)
- No of Childcare Places: 40
- Provider: School
- Other Schools: Yes
- Weeks Open:
- Notes: Parent and carers help with childcare.

Buttons: OK, Cancel

4. Enter the required details.
  - **Type** - based on the record you have opened, the type of childcare being provided is displayed automatically. The four types of childcare collected for the return are:
    - **Before School Childcare**
    - **After School Childcare**
    - **Holiday Childcare**
    - **Under Fives Childcare.**
  - **On Site** - select the applicable option from the drop-down list:
    - **Yes** - select this option if childcare is being provided on the school premises.
    - **No** - select this option if childcare is undertaken off the school premises, i.e. your school promotes or points parents towards a regular off-site childcare service, e.g. a private or voluntary organisation.
  - **Signposted** - one of the following options must always be selected from the drop-down list:
    - **Yes, formal arrangements including transport** - select this option if your school has formal arrangements with another provider that provides childcare for your students, including transport to their site.
    - **Yes, list of providers that pick up from school** - select this option if a list of local providers that will pick up students from the school to help parents is provided.
    - **No**
    - **Not Known.**

- **Opening Time** - enter the time that the service becomes available (not applicable to after school care).

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

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

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

- **Number of Childcare Places** - enter the maximum number of childcare places that the service can provide.
  - **Provider** - select the description from the drop-down list that most accurately describes the provider of the service:
    - **School**
    - **School in Partnership** (with another provider)
    - **Other (non-school) Provider.**
  - **Other Schools** - is the service made available to children from other schools? Select as applicable from the drop-down list:
    - **Yes**
    - **No**
    - **Unknown.**
  - **Weeks Open** - enter the number of weeks for which childcare is provided (applicable to holiday and under-fives childcare only).
  - **Notes** - notes can be added and then edited later, if required.
5. Click the **OK** button to return to the **School Details** page.
  6. Click the **Save** button and then the **OK** button to return to the **Census Return Details** page.

## Editing Students with Top-Up Funding

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

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

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

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

**03| Producing the School Census Spring Return**

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

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

**Update Students with Top-up Funding**

Update

Term: Spring 2019 Students On-Roll on Census Day

Surname:  Forename:  YTI: All Reg: All

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

Top-up Funding

| Surname | Preferred Surname | Forename | YTI | Reg | SEN | Ever in Care |
|---------|-------------------|----------|-----|-----|-----|--------------|
| Abbess  | Abbess            | Graham   | 9   | 9A  | E   | No           |
| Bristol | Bristol           | Andrew   | 11  | 11C |     | Yes          |
| Whiting | Whiting           | Kellyann | 11  | 11E |     | No           |

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

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

**Update Students with Top-up Funding**

Update

Term: Spring 2019 Students On-Roll on Census Day

Surname: smith Forename:  YTI: 8 Reg: All

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

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

Top-up Funding

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

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

The screenshot shows the 'Students On-Roll on Census Day' panel with search filters and a table of students. Below it is the 'Top-up Funding' panel with an 'Add' button and a table of students currently in that list.

**Students On-Roll on Census Day**

Term: Spring 2019

Surname: smith, Forename: , YTI: 8, Reg: All

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

| Surname | Preferred Surname | Forename  | YTI | Reg | SEN | Ever in Care |
|---------|-------------------|-----------|-----|-----|-----|--------------|
| Smith   | Smith             | Jade      | 8   | 8A  |     | No           |
| Smith   | Smith             | Osiias    | 8   | 8A  |     | No           |
| Smith   | Smith             | Stephanie | 8   | 8A  |     | No           |
| Smith   | Smith             | Tristan   | 8   | 8A  |     | No           |

**Top-up Funding**

Buttons: Add, Remove

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

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



#### Additional Resources:

*Preparing for the School Census Spring 2019 Return handbook*

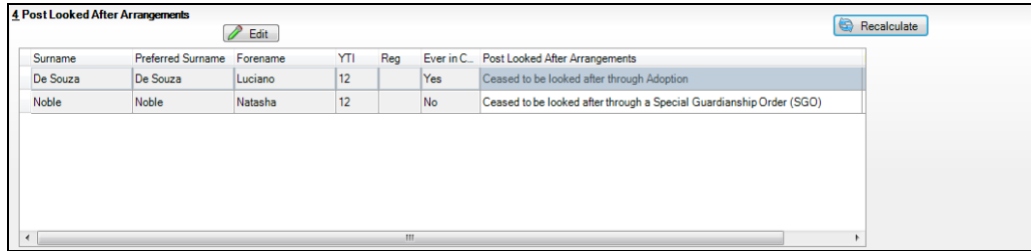
## Editing Student Post Looked After Arrangements

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

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

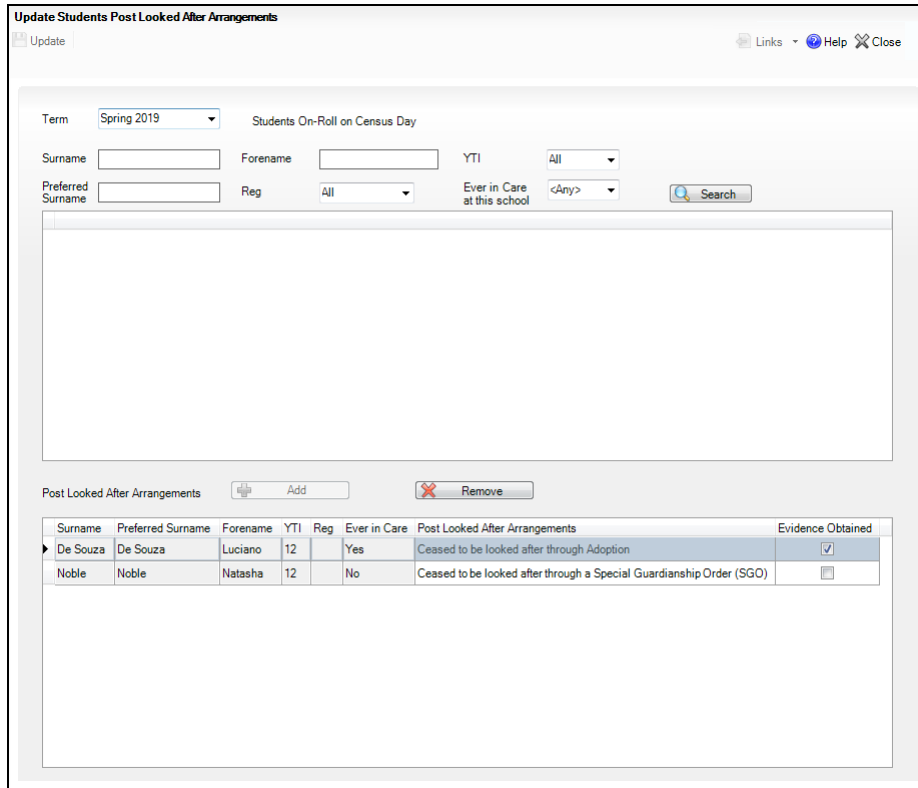
**03| Producing the School Census Spring Return**

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



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

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



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



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

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

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

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

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

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

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

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

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

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

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



**Additional Resources:**

*Preparing for the School Census Spring 2019 Return handbook*



**More Information:**

*Post Looked After Arrangements Report on page 41*

## Editing Class Information

When the School Census is generated, the class information displayed is a 'snapshot' of SIMS data as of the selected period on census day. The selected period is based on the last digit of your DfE establishment number (please see *Specifying the Selected Period on Census Day* on page 13).

**NOTE: If the school is closed on census day, the information displayed is still based on classes as at census day.**

If the **Include Alternative Curriculum** check box is selected (in the **Selected Period on Census Day** panel), Alternative Curriculum periods are included in the list of class names displayed in the **Classes** panel.



**More Information:**

*Class Report on page 41*

## Editing Timetabled Classes

The timetabled classes previously set up in Nova/Academic Management are displayed in the read-only **Class Name** column. The **Total** numbers of students and staff are calculated automatically and displayed at the bottom of the panel.

| Class Name   | Students (On Roll) | Students (Guest) | Teachers  | Support Staff | YTI     |
|--------------|--------------------|------------------|-----------|---------------|---------|
| 10x/Bl1      | 28                 | 0                | 1         | 0             | Year 10 |
| 10x/Sc2      | 27                 | 0                | 1         | 0             | Year 10 |
| 10x/Sc3      | 26                 | 0                | 1         | 0             | Year 10 |
| 10y/En1      | 27                 | 0                | 1         | 0             | Year 10 |
| 10y/En2      | 27                 | 0                | 1         | 0             | Year 10 |
| 10y/En3      | 26                 | 0                | 1         | 0             | Year 10 |
| <b>Total</b> | <b>888</b>         | <b>0</b>         | <b>38</b> | <b>1</b>      |         |

Check and, if necessary, edit the following information.

- **Students (On Roll)**  
The number of students in the timetabled class at the selected period is displayed. The entries in this column can be edited if required. Ensure that:
  - any students temporarily absent on the census day are included.
  - any part-time students not scheduled to be in school at the selected period are excluded. These students should be counted in the **Student Reconciliation** panel instead (please see *Editing Student Reconciliation* on page 26).
- **Students (Guest)**  
This column displays any guest students who are normally in the timetabled class at the selected period. Ensure that any guest students have an **Enrolment Status** of **Guest student** in the **Student Details** panel (**Focus | Students | Student Details**).
- **Teachers**  
Include all qualified and unqualified teachers taking the timetabled class at the selected period.  
Exclude teachers who are:
  - wholly or mainly providing support to individual students.
  - on Planning, Preparation and Assessment (PPA) time.
- **Support Staff**  
Include teaching assistants, special needs support staff, support staff for minority ethnic students and other education support staff in the timetabled class at the selected period.  
Exclude non-teaching staff wholly or mainly providing support to individual students.
- **Year Taught In**  
This column shows the curriculum year group of each class displayed. To edit the year group, click in the cell and select from the drop-down list.  
Select **Mixed Year** if a timetabled class contains students from more than one National Curriculum year.

*NOTE: This does not include classes containing any students who have been held back, or advanced a year and are of a different chronological age to the rest of the class.*

**Type, Key Stage and Activity** (applicable to schools that have timetabled classes for Years Taught In under 7)

These three columns are displayed only if your school has timetabled classes for Years Taught In under 7. If applicable, enter the required values.

### Recalculating the Classes Information

The data in the **Classes** panel can be replaced with the original data from the database by clicking the appropriate **Recalculate** button.

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

### Adding Classes

It might be necessary to add an additional class if, for example, some students are receiving additional teaching support. This is achieved by clicking the **New** button then entering the applicable class information in the additional row, which is displayed at the bottom of the table.

*NOTE: Remember to reduce the number of students in the main class.*

Ensure that you click the **Save** button to save the data and refresh the display.

### Deleting Classes

In some circumstances, classes might need to be deleted, e.g. if they do not normally take place at the selected period. This is achieved by highlighting the class then clicking the **Delete** button.

**IMPORTANT NOTE:** If you delete a class that contains students, you must recalculate again to ensure that student numbers are correct.

## Editing Student Reconciliation

The **Student Reconciliation** panel is used to reconcile the various categories of students with the numbers in the **Classes** panel. The number of on-roll students who are not in class at the selected period, because they are attending another school, part-time, etc. should be entered in the appropriate fields.

|                                  |                                  |                                  |                                   |
|----------------------------------|----------------------------------|----------------------------------|-----------------------------------|
| <b>8 Student Reconciliation</b>  |                                  |                                  |                                   |
| On roll students in classes      | <input type="text" value="924"/> | Total students                   | <input type="text" value="924"/>  |
| Part-time students not at school | <input type="text" value="0"/>   | Students on work experience      | <input type="text" value="0"/>    |
| Private study students           | <input type="text" value="0"/>   | Students at FE colleges          | <input type="text" value="0"/>    |
| Students at another school       | <input type="text" value="0"/>   | Must agree with Students on roll | <input type="text" value="1016"/> |

For example:

In the previous example there are 1016 **Students On Roll** but only 924 **On Roll students in classes**. The difference must be accounted for. This could be the number of students who are attending another school at the selected period. In which case, **92** should be entered in the **Students at another school** field.

1. If applicable, enter the number of **Part-time students not at school**, the number of **Private study students** and the number of **Students at another school**.
2. If applicable, enter the number of **Students on work experience** and the number of **Students at FE colleges**.
3. Check the values in the **Total students** and **Students On Roll** fields. The two values must be the same.

The value in the **Total students** field is calculated automatically and equals the sum of the following:

- **On Roll Students in classes**
  - **Part-time students not at school**
  - **Private study students**
  - **Students at another school**
  - **Students on work experience**
  - **Students at FE colleges.**
4. Amend the values in the editable fields, if necessary.

## Entering Attendance Information

Termly attendance data (including attendance codes and the number of sessions missed) should be provided for non-boarder students and leavers aged four to 15 inclusive on 31/08/2018, who were on-roll for at least one session during the collection period from the start date of the Autumn term to 31/12/2018.

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

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

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

- SIMS Attendance/Lesson Monitor is in use, the attendance codes being used are DfE compliant and there are either:
  - no missing marks
  - or
  - missing marks.
- SIMS Attendance/Lesson Monitor is in use and the attendance codes being used are DfE non-compliant.

- SIMS Attendance/Lesson Monitor is not in use.



**More Information:**

Attendance Report on page 39

## SIMS Attendance/Lesson Monitor Users

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

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

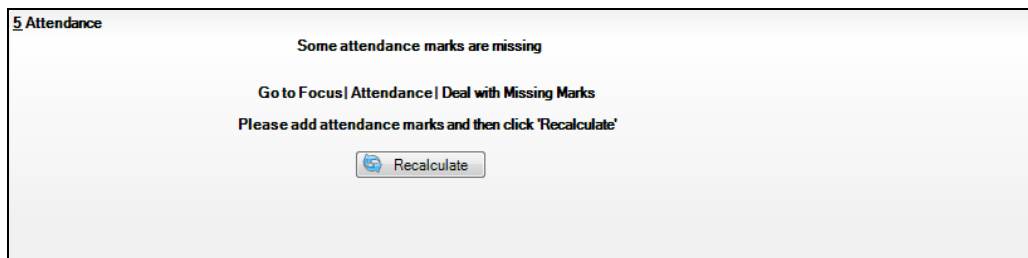
## Are your Attendance Codes DfE Compliant?

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

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



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

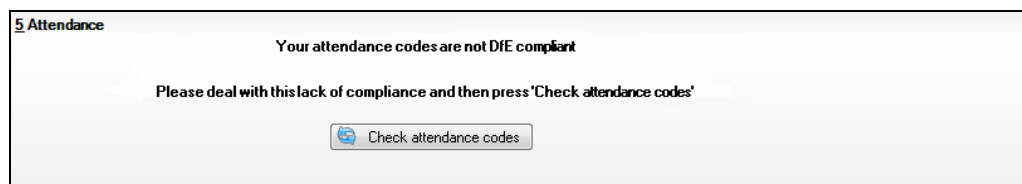


1. Use the Deal with Missing Marks routine (**Focus | Attendance (or Lesson Monitor) | Deal with Missing Marks**) to locate the missing marks and enter appropriate attendance codes.
2. Return to the **Census Return Details** page and click the **Check missing marks** button in the **Attendance** panel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

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

## Are your Attendance Codes DfE Non-Compliant?

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



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

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

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

## SIMS Attendance/Lesson Monitor Not in Use

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

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

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

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

- To clear the attendance information and check for additional students, click the **Check for additional students & zero totals** button.

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

## Entering General Information

The **General** panel deals with the number of students who receive Free School Meals on census day.

|   |  |
|---|--|
| <b>12 General</b>                               |  |
| Number of free school meals taken on census day | <input type="text" value="0"/> FSM taken excludes the infant pupil universal entitlement (except for pupils in R,1,2 who are eligible for FSM) |

Enter the **Number of free school meals taken on census day** by students, in any year, who are eligible for Free School Meals.

- Students should be included only if they meet the Free School Meals eligibility criteria (i.e. in respect to family income).
- If your school has students of a young age, do not include students taking school meals in Reception, Year 1 and Year 2, if they are not eligible for Free School Meals in respect to family income, e.g. they are receiving a Universal Infant School Meal only.



**More Information:**

General Report on page 42

## Entering Secondary Admissions Appeals Totals

Applicable to Secondary, Middle deemed Secondary and All-Through schools. Schools that were Academies, Voluntary Aided schools or Foundation schools at the time that the appeals were lodged, should also complete this panel.

The **Secondary Admissions Appeals** panel deals with appeals lodged before 01/09/2018 against refusals to admit a student for a place at your school at the start of the 2018/2019 academic year.

All fields in this panel are editable and must be populated manually.

|  |   |
|--|---|
| <b>11 Secondary Admissions Appeals</b>   |   |
| Foundation Schools/Voluntary Aided Schools/Academies must complete this section (this does not include AP Academies, AP Free Schools, Academy Special Schools) | Independent Admissions Committee        |
| Lodged <input type="text" value="0"/>  | Heard <input type="text" value="0"/>    |
| Withdrawn <input type="text" value="0"/>   | Upheld <input type="text" value="0"/>   |
|  | Rejected <input type="text" value="0"/> |

- Enter the total number of admissions appeals that have been **Lodged** and the total that have been **Withdrawn** before 01/09/2018 against a refusal to admit a child to the school for a place at the start of the 2018/2019 academic year.

Information about appeals lodged on or after 01/09/2018 is not required. Enter information related to entry to the school at the start of the academic year only.

- Enter the total number of admissions appeals **Heard**, **Upheld** and **Rejected** by the **Independent Admission Committee**.



When this panel is complete and you are satisfied that all the details on the **Census Return Details** page are correct, the census return file can be created and validated (please see *Creating and Validating a School Census Return* on page 33).

# 04 | Completing the School Census Spring Return

|  |    |
|--|----|
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## Creating and Validating a School Census Return

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

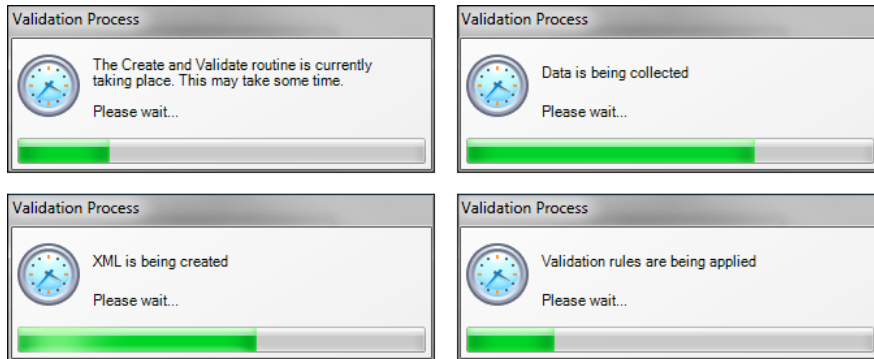
Validating the return creates an unauthorised return file, which is then run against a set of DfE rules. When the validation is complete, a list of errors and queries is displayed.

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

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

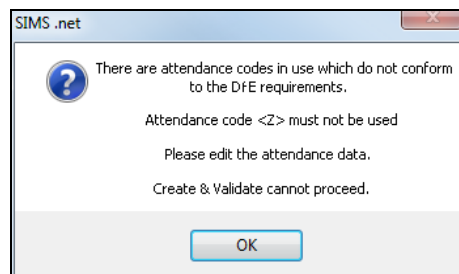
#### 04| Completing the School Census Spring Return

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



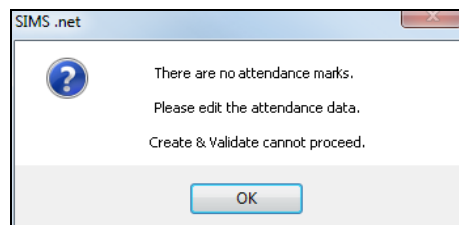
If there is an irregularity in the attendance marks, one of the following messages is displayed:

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



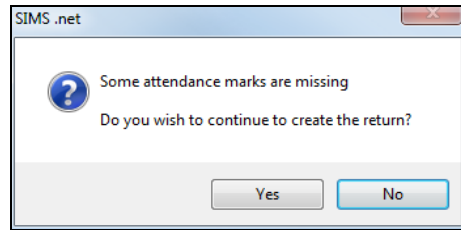
The lack of compliance must be dealt with before the Create and Validate process can be performed. Please contact your Local Support Unit for assistance.

- 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 (or Lesson Monitor) | Deal with Missing Marks**) to locate the missing marks and enter appropriate attendance codes. For more information, please refer to the *Managing Pupil/Students Attendance or Monitoring Session and Lesson Attendance* handbook, as applicable.

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

## Resolving Validation Errors and Checking Queries

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

| Type | Sequence | Message  | Location   | Solution   |
|------|----------|--|--|--|
| F    | 1500     | UPN missing.   | Name: Abraham, Janel Date of Birth: 2005-05-19, Female/UPN                           | # Go to Focus   Student   Student Details and add or issue a UPN.                          |
| F    | 1500     | UPN missing.   | Name: Reid, Rosiel Date of Birth: 2009-03-07, Female/UPN                             | # Go to Focus   Student   Student Details and add or issue a UPN.                          |
| F    | 1840     | Pupils aged 5 and over Language missing or invalid.  | Name: Henderson, Jacki Date of Birth: 2010-05-07, Male/UPN: K23229914029             | # Go to Focus   Student   Student Details Ethnicultural panel and enter First language.    |
| F    | 2350     | Insufficient Address information provided.   | Name: Berns, Kiwi Date of Birth: 2005-01-18, Male/UPN: H232200109012                 | # Go to Focus Student Student Details Addresses and edit pupil's address                   |
| Q    | 1601Q    | Please Check: Pupil's age is out of range for school type.                                       | Name: Sungail, Skasste Date of Birth: 2003-03-28, Female, Age: 12/UPN: B820200106088 | # Go to Focus   Student   Student Details and enter pupil's date of birth.                 |
| Q    | 1620Q    | Please check: duplicate pupil records with the same Surname, Forename, Gender and Date of birth. | Name: Bennison, Hugo Date of Birth: 2010-02-03, Male/UPN:                            | # Go to Focus Student Student details and check for duplicate pupil record.                |
| Q    | 1620Q    | Please check: duplicate pupil records with the same Surname, Forename, Gender and Date of birth. | Name: Bennison, Hugo Date of Birth: 2010-02-03, Male/UPN: V823299914008              | # Go to Focus Student Student details and check for duplicate pupil record.                |
| Q    | 2385Q    | Please check: Pupil record with no address details.  | Name: Balinski, Cylai Date of Birth: 2010-03-14, Female/UPN: C832299914005           | # Go to Focus Student Student Details Addresses and edit pupil's address                   |
| Q    | 2520Q    | Please check: sessions possible should not be greater than 150                                   | Name: Aaron, Lizi Date of Birth: 2005-09-01, Female/UPN: J820200109032               | # Go to Focus   Attendance (Lesson Monitor)   Display Marks and check the attendance marks |
| Q    | 2520Q    | Please check: sessions possible should not be greater than 150                                   | Name: Aaron, Sophie Date of Birth: 2005-09-01, Female/UPN: M820200109034             | # Go to Focus   Attendance (Lesson Monitor)   Display Marks and check the attendance marks |

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

**04| Completing the School Census Spring Return**

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

| Column          | Description  |
|-----------------|--|
| <b>Type</b>     | Displays the type of validation rule:<br>Failure ( <b>F</b> displayed in red) indicates an error, which must be corrected.<br>Query ( <b>Q</b> displayed in black) indicates that there are unusual data conditions. These should be considered and corrected, if necessary. |
| <b>Sequence</b> | Shows the error or query number.   |
| <b>Message</b>  | Displays the text of the error or query message.   |
| <b>Location</b> | Lists the specific record containing the error or query.   |
| <b>Solution</b> | 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.



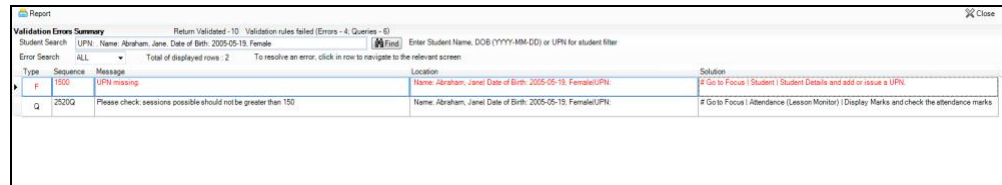
**NOTE:** A hyperlink is also indicated by a hash symbol (#) preceding the **Solution** text.

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

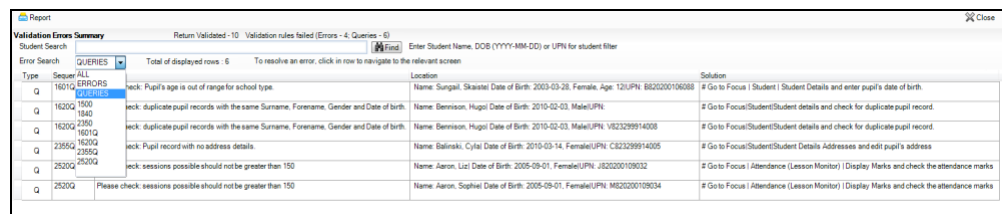
- The Student Search functionality can be used to display all errors and queries relating to a particular student. Enter all or part of a UPN, student's surname or date of birth in the **Student Search** field then select the required record from the **Student Search** drop-down list to populate the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



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

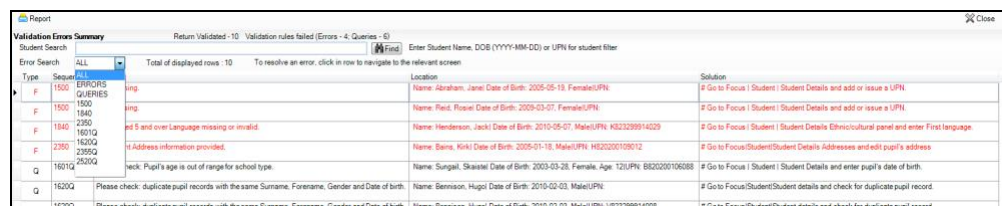


- Use the **Errors Search** to display the required error or query you want to view. Select **ALL**, **ERRORS**, **QUERIES** or the required number from the drop-down list. The total number of rows that relate to the selected validation is displayed adjacent to the **Error Search** field.



- 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 44).

## 04 | Completing the School Census Spring Return

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

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

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

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

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

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

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



### **More Information:**

*Transferring Report Data to a Spreadsheet on page 44*

## Producing Detail Reports

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

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

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

The following reports are currently available.

### **On-Roll Basic Details Report**

Report Criteria: Students on-roll on census day.

This report provides basic information about the students, e.g. UPN, ULN, legal surname, legal forename, preferred surname, former surname, date of birth (DOB), gender, year taught in (YTI), date of admission (DOA), enrolment status, ethnicity, language, Youth Support Services Agreement indicator (YSSA), part-time status and boarder status.

### **Leavers Basic Details Report**

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

- Leavers with attendance one term ago (from the start of the 2018 Autumn term to 31/12/2018); and/or
- Leavers with exclusions two terms ago (02/04/2018 to 31/08/2018); and/or
- Leavers with learner support of Vulnerable Group Bursary Awarded or Discretionary Bursary Awarded from 01/08/2018 to 17/01/2019.

This report provides basic information about leavers, e.g. 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), ethnicity, language, part-time status, boarder status, attendance, exclusions and learner support status.

### **Exclusions Report**

Report Criteria: On-roll students and leavers with exclusions two terms ago (02/04/2018 to 31/08/2018). Not applicable to students who have exclusions with appeal result of **Reinstated** or **Not in the best interests of the child**.

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

### **Attendance Report**

Report Criteria: Students with attendance one term ago (from the start of the 2018 Autumn term to 31/12/2018). On-roll and leavers (but not boarders) who were aged four to 15 at 31/08/2018.

This report displays the following information about students and their attendance: UPN, legal surname, legal forename, date-of-birth (DOB), gender, year taught in (YTI), termly sessions possible, termly absence sessions, on-roll status, termly attendance codes (divided into authorised and unauthorised sessions) and attendance not required (Y). Column totals are displayed at the bottom of each column.

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



### **Absentees Report**

Report Criteria: On-roll students and leavers (not boarders) who have an absence rate of 10% or above, with attendance one term ago (Start of autumn term to 31/12/2018), who were aged four to 15 at 31/08/2018.

An individual pupil's overall absence rate is calculated as follows:

$$\text{Overall absence rate} = \frac{\text{Total overall absence sessions}}{\text{Total sessions possible}} \times 100$$

The report provides the following information about the students who match the report criteria: UPN, legal surname, legal forename, date of birth (DOB), gender, year taught in (YTI), number of sessions possible, session absence (i.e. the number of authorised plus unauthorised absences), on-roll status and enrolment status.

This report assists in the tracking of absence (particularly persistent absence) and highlights those absences that might need to be tracked.

### **SEN Report**

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

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

### **Address Details Report**

Report Criteria: Students on-roll on census day.

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

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

## Free School Meal Eligibility Report

Report Criteria: On-roll students on census day who were eligible for free school meals on or after 05/10/2018 and up to and including census day.

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

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

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

## Learner Support Report

Report Criteria: On-roll students and leavers aged 16 plus at 31/08/2018 who have been awarded Vulnerable Group and/or Discretionary Bursary funding from 01/08/2018 to 17/01/2019.

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

## Top-up Funding Report

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

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

## Post Looked After Arrangements Report

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

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

## Class Report

Report Criteria: Classes on the selected period on the reference date.

This report provides class information: class name, number of on-roll students in class, number of guests students in class, number of teachers, number of support staff and the year taught in (YTI).

Displayed at the bottom of this report is the student reconciliation data:

- part-time students not at school
- private study students
- students at another school
- students on work experience

## 04| Completing the School Census Spring Return

- students at Further Education colleges
- total students not in class at selected period.

### General Report

Where applicable, the General report provides information about:

- free school meals taken on census day.
- all appeals that were made in the academic year 2017/2018 against a refusal to admit a student into the school for the 2018/2019 academic year.
- childcare provisions during the 2018/2019 academic year.

The report displays the following information: childcare type, on site, signposted, opening time, closing time, number of childcare places, provider, other schools and weeks open.

### Generating Detail Reports

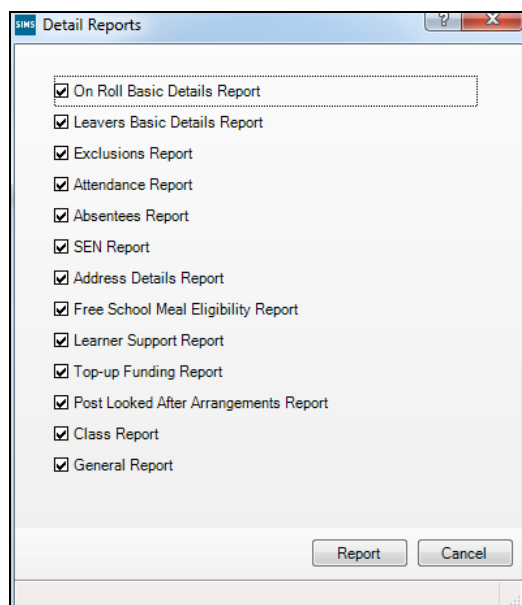
#### Selecting a Single Detail Report

Select the required report from the **Detail Report** drop-down list located at the top of the **Census Return Details** page. The selected report is generated automatically.

The screenshot displays the 'Census Return Details' web application interface. The page title is 'Census Return Details - Spring 2019 Term: School Census Spring 2019 01/09/2019 - 31/12/2018'. A 'DetailReport' dropdown menu is open, showing a list of report options: On Roll Basic Details Report, Leavers Basic Details Report, Exclusions Report, Attendance Report, Absentees Report, SEN Report, Address Details Report, Free School Meal Eligibility Report, Learner Support Report, Top-up Funding Report, Post Looked After Arrangements Report, Class Report, General Report, and Multiple Reports... The 'Multiple Reports...' option is highlighted. The background shows the '1 Census Details' section with fields for Census Date (17/01/2019), Description (School Census Spring 2019), and various collection dates for Attendance, Exclusions, FSM, and Learner Support. The '2 Selected Period on Census Day' section shows a Reference Date of 17/01/2019 and a Curriculum Year of 7. A 'Calculate All Details' button is visible at the bottom right.

### Selecting Multiple Detail Reports

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



2. If any reports are not required, deselect the associated check box.
3. Click the **Report** button to generate the selected reports.

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

The report(s) are saved automatically in the **Census Folder**, which was specified in the **Census Return** browser, e.g. C:\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 consists of the following data fields separated by underscores ('\_'):

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

For example:

```
8234321_SC1_823LL19_001_onroll_basic_details_report.html.
```

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Example of an On Roll Basic Details report:

| School Census Spring - 2019 (On Roll Basic Data)   |            |  |                |                                   |                |            |        |     |            |                     |                 |          |          |                  |               |
|--|------------|--|----------------|-----------------------------------|----------------|------------|--------|-----|------------|---------------------|-----------------|----------|----------|------------------|---------------|
| <b>Security Message :</b> This report contains sensitive information.  |            |  |                |                                   |                |            |        |     |            |                     |                 |          |          |                  |               |
| <b>Report Criteria:</b> Students on roll on Census day (17/01/2019)  |            |  |                |                                   |                |            |        |     |            |                     |                 |          |          |                  |               |
| <b>Total Students:</b> 956   |            |  |                |                                   |                |            |        |     |            |                     |                 |          |          |                  |               |
| <b>School Name:</b> Green Abbey School   |            | <b>Fileset Number:</b> 1100 (SIMS.net) |                |                                   |                |            |        |     |            |                     |                 |          |          |                  |               |
| <b>Filename:</b> 8234321_SC1_823LL19_001.UNA   |            |  |                | <b>Report Created:</b> 13/08/2018 |                |            |        |     |            |                     |                 |          |          |                  |               |
| <b>XML Version:</b> Validation 2018.Base - Updated: 2017-12-05 ErrorList 2018.Base - Updated: 2017-12-05 Summary 2018.Base - Updated: 2017-12-05 |            |  |                |                                   |                |            |        |     |            |                     |                 |          |          |                  |               |
| UPN  | ULN        | Legal Surname                          | Legal Forename | Preferred Surname                 | Former Surname | DOB        | Gender | YTI | DOA        | Enrolment Status    | Ethnicity       | Language | YSSA     | Part-time Status | Boarder       |
| Y820200109033  | 5142335558 | Aaron                                  | Chris          | Aaron                             | -              | 01/09/2005 | Male   | 8   | 01/09/2011 | Single Registration | White - English | English  | Unsought | No               | Not a Boarder |
| G023432117001  | 5142311344 | Aaron                                  | Jason          | Aaron                             | -              | 08/03/2008 | Male   | 8   | 01/09/2011 | Single Registration | White - Cornish | English  | Unsought | No               | Not a Boarder |
| J820200109032  | 5142335501 | Aaron                                  | Liz            | Aaron                             | -              | 01/09/2005 | Female | 8   | 01/09/2011 | Single Registration | White - English | English  | Unsought | No               | Not a Boarder |
| M820200109034  | 5142335553 | Aaron                                  | Sophie         | Aaron                             | -              | 01/09/2005 | Female | 8   | 01/09/2011 | Single Registration | White - English | English  | Unsought | No               | Not a Boarder |
| N823432113104  | 1111179838 | Abbees                                 | Graham         | Abbees                            | -              | 29/09/2002 | Male   | 11  | 03/09/2014 | Single Registration | White - English | English  | Obtained | No               | Not a Boarder |
| Z003432113106  | 1111179844 | Abbees                                 | Graham         | Abbees                            | -              | 29/09/2002 | Male   | 11  | 03/09/2014 | Single Registration | White - English | English  | Obtained | No               | Not a Boarder |



### More Information:

Configuring the Census Folder on page 10

Transferring Report Data to a Spreadsheet on page 44

## 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 the **Print** option (**Ctrl+P**) 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.

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

**IMPORTANT NOTE:** The spreadsheet contains the same level of sensitive information as the original HTML report from which the information was transferred. Therefore, the spreadsheet file must be 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 school staff, who are involved in the return's preparation, to assess the accuracy and completeness of the return data. It should then be passed to the Head Teacher for their review.

*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. C:\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 consists of the following data fields separated by underscores (^\_'):

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

For example: 8234321\_SC1\_820LL19\_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 might request that a copy of the Summary report is signed by the Head Teacher and sent to the LA when the return has been authorised.



### More Information:

- Configuring the Census Folder on page 10*
- Generating Detail Reports on page 42*
- Transferring Report Data to a Spreadsheet on page 44*
- Authorising the Return on page 47*
- Deleting an Unauthorised Return on page 52*

## Editing an Unauthorised Return

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

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

1. Select **Routines | Statutory Returns | <census name>** to display the browser.
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. Click the **Create & Validate** button to display the **Validation Errors Summary** panel.
6. Resolve any errors and check any queries before running the Summary report and detail reports to ensure that the information is correct.

7. Repeat the editing process again, if necessary.
8. Click the **Save** button.



#### More Information:

*Configuring the Census Folder on page 10*  
*Specifying the Security Message for Reports on page 12*  
*Resolving Validation Errors and Checking Queries on page 35*  
*Producing Detail Reports on page 38*  
*Producing the Summary Report on page 45*

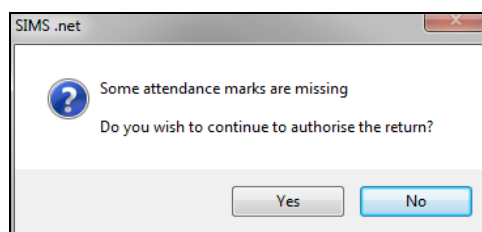
## Authorising the Return

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.

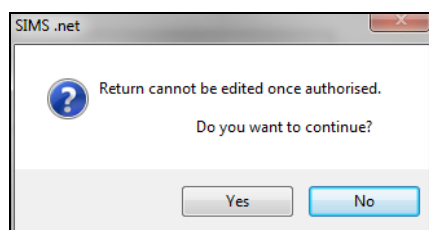
1. Click the **Authorise** button.

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.

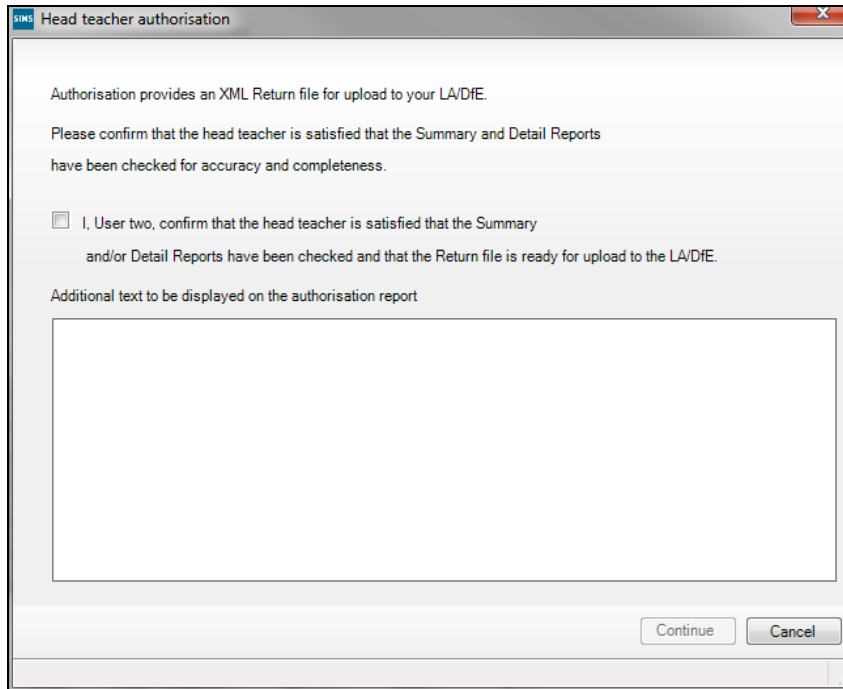


3. Click the **Yes** button to continue or the **No** button to return to SIMS where edits can be made to the data before authorising.



#### 04 | Completing the School Census Spring Return

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 45

*Retrieving Authorised Census Return Files* on page 49

*Copying a Return* on page 51

## 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.

Guidance about how Local Authorities, schools and academies should submit school census data is available on the GOV.UK website (<https://www.gov.uk/guidance/school-census>).

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.*

## 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.

#### 04| Completing the School Census Spring Return

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.

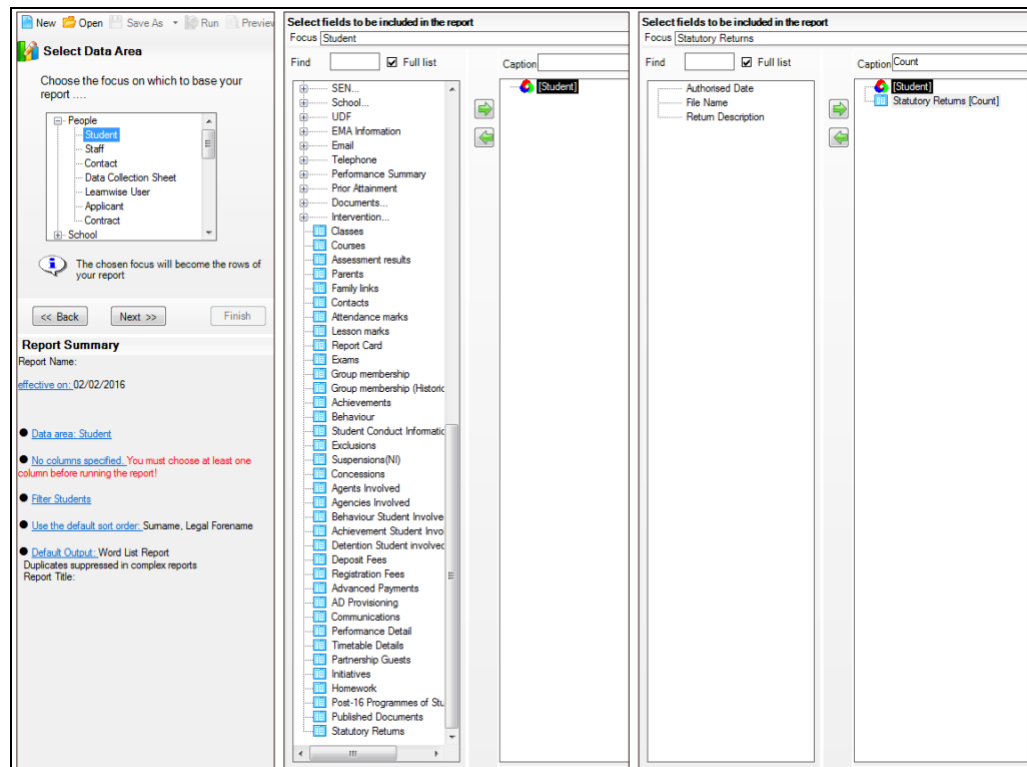
The authorised return file (i.e. the XML file) and all reports associated with the selected return are downloaded from your DMS to the specified folder. The folder and its contents are then displayed automatically, enabling you to open the required files in your web browser.

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 *not* be copied but will be populated from the current values held in the database. The Create & Validate routine must be run to generate a new census file.

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

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

## Deleting an Unauthorised Return

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

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

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

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

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

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