

Preparing for the School Census Autumn 2011 Return

Secondary / Middle Deemed Secondary
Schools

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School Census Autumn 2011 Preparation Check List

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

Complete	Description
<input type="checkbox"/>	Check with your System Administrator/Manager that you have the appropriate permissions to run the School Census and record associated data. For more information, please see <i>Permissions Required</i> on page 3.
<input type="checkbox"/>	Upgrade to the SIMS 2011 Summer Release (SIMS 7.140) or later as soon as possible to enable dry runs to be carried out. For more information, please see <i>What Version of SIMS is Required?</i> on page 4.
<input type="checkbox"/>	Check with your System Administrator/Manager that the latest fileset version has been imported. For more information, please see <i>Importing Filesets</i> on page 4.
<input type="checkbox"/>	Carry out a dry run to determine what information needs to be updated. For more information, please see <i>Carrying out a Dry Run</i> on page 11.
<input type="checkbox"/>	Check School Level information. For more information, please see <i>Preparing School Level Information</i> on page 17.
<input type="checkbox"/>	Check the students' basic details. For more information, please see <i>Checking/Correcting a Student's Basic Details</i> on page 26.
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Check the students' various registration details. For more information, please see: <i>Checking Enrolment Status, Admission Date and Boarder Status</i> on page 27. <i>Checking/Correcting UPNs</i> on page 28. <i>Checking/Correcting Unique Learner Numbers</i> on page 29. <i>Checking/Correcting Part-Time Student Information</i> on page 30. <i>Checking/Correcting the National Curriculum Year Group</i> on page 32.
<input type="checkbox"/>	Check free school meal information. For more information, please see <i>Checking Eligibility for Free School Meals</i> on page 37.
<input type="checkbox"/>	Check first language information. For more information, please see <i>Checking First Language Information</i> on page 39.
<input type="checkbox"/>	Check Connexions information. For more information, please see <i>Checking/Correcting Connexions Assent</i> on page 40.

School Census Summer 2001 Preparation Check List

Complete	Description
<input type="checkbox"/>	Check that leavers and re-admissions have been recorded. For more information, please see <i>Recording Leavers and Re-Admissions</i> on page 41.
<input type="checkbox"/>	Check Special Educational Needs information. For more information, please see: <i>Checking/Correcting Special Educational Needs (SEN) Information</i> on page 43.
<input type="checkbox"/>	<i>Adding Gifted and Talented Students</i> on page 45.
<input type="checkbox"/>	Check exclusions information. For more information, please see <i>Preparing Exclusions Information</i> on page 47.
<input type="checkbox"/>	Check attendance data. For more information, please see <i>Preparing Attendance Information</i> on page 50.
<input type="checkbox"/>	If applicable to your school, check the Hours at Setting for 2, 3 and 4 year olds. For more information, please refer to the Primary version of this guide, which is available on our SupportNet website (http://support.capitaes.co.uk) by entering CENSUS11 in the Site Search field on the SupportNet Home page then clicking the Go button.
<input type="checkbox"/>	Check Post 16 information recorded in Course Manager (Applicable to Secondary schools with a Sixth Form only). For more information, please see <i>Preparing Post 16 Information in Course Manager</i> on page 51 and refer to the <i>Preparing Post 16 Data for the School Census Autumn 2011</i> guide, which is available on our SupportNet website (http://support.capitaes.co.uk) by entering CENSUS11 in the Site Search field on the SupportNet Home page then clicking the Go button.
<input type="checkbox"/>	Delete any student records that have been created in error. For more information, please see <i>Deleting Unwanted Student Records</i> on page 52.

Notes

01 Introduction

Introduction

This preparation guide has been produced to help you to identify the most common tasks that need to be carried out before running the School Census Autumn 2011 Return.

The information in this guide applies to all LA maintained Secondary schools and Middle deemed Secondary schools. It also applies to Academies that cover the Secondary school phase and City Technology Colleges (CTCs). Service Children's Education in Secondary schools can also run the return on a voluntary basis.

For Secondary schools with a sixth form, an additional Preparation guide is available, which deals specifically with Post 16 data: *Preparing Post 16 Data for the School Census Autumn 2011 Return* guide.

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



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

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

Changes to the School Census Autumn Return include the following:

Calculating All Details

The **Calculate All Details** button has been moved from the **School Information** panel to the top right-hand side of the **Census Details** panel. This is purely a cosmetic change to make the button for this important piece of functionality more visible.

School Information

Routines | Statutory Returns | School Census

The **School Information** panel now displays information collected in the return only, e.g. the school address is no longer displayed.

Hours at Setting

Applicable to schools with 2, 3 or 4 year old pupils only

Tools | Statutory Return Tools | Hours at Setting

By default, the **Hours at Setting** value has changed from zero to blank.

A value must be entered for each pupil however, **0** (zero) is a valid value. The number of hours entered per pupil can be between 0.0 and 99.5.

If any **Hours at Setting** value is left blank, a validation error is displayed when the return is created and validated.

Updating Learning Aims

Routines | Statutory Returns | School Census

The **Update Learning Aims** panel supersedes the **Previous Summer Census** panel, which was included in the Autumn 2010 return. This new panel includes the following new functionality:

- Learning Aims submitted in error in the previous Summer return are indicated automatically by a tick but can be manually edited, if required.
- If the **Planned End Date** for Summer 2011 differs from that of Autumn 2011, the **Planned End Date** for Summer 2011 is displayed.
- The automatic update of information with that taken from Course Manager. Two options are available:
 - **Update from Course Manager** preserving manual edits.
 - **Recalculate** overwriting manual edits.

The ability to edit information in the panel. The colour of cells in the grid indicate if the information can be edited.

- the provision of the following reports to assist with the checking of information:
 - **Learning Aims Comparison with Course Manager report**
The Learning Aims Comparison with Course Manager report enables you to compare Learning Aims reported for School Census Autumn 2011 with values held in Course Manager.
 - **Learning Aims Comparison report**
The Learning Aims Comparison report enables you to compare Learning Aims reported for the School Census Summer 2011 with Learning Aims to be reported for School Census Autumn 2011.

Authorising the Return

Routines | Statutory Returns | School Census

The **Head teacher authorisation** dialog has been introduced to enable you to confirm that the Head Teacher has checked the Summary and detail reports and that the return file is ready for upload to the LA/DfE.

When the confirmation check box is selected, the **Continue** button becomes active, enabling the authorisation process to be completed.

On completion of the authorisation process, the Summary report is generated and displayed in your web browser, from where it can be saved for future reference or printed and sent to your LA/DfE, if requested.

Permissions Required

The following permissions are applicable to School Census return users.

Producing the Return

To produce the return, you must be a member of one of the following user groups in System Manager:

- Returns Manager
- Returns Operator.

Editing and Preparing Data

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

- Administration Assistant
- Admissions Officer
- School Administrator.

Importing Filesets

A Fileset contains the files used to determine the information to be collected in the return. It also enable updates to the Validation Errors Summary and the Summary report (both derived from files supplied by the Statutory Body), and detail reports (provided by SIMS) to be imported into SIMS between SIMS releases.

It is therefore essential that the correct fileset is imported. The correct Fileset can be identified by its accompanying number.

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

- Personnel Officer
- Returns Manager
- System Manager.

For more information about the Import Fileset functionality, please see *Importing Filesets* on page 4.

Where to find More Information about Permissions

Please see your System Administrator/Manager if you are not sure whether you have the required permissions. For more information, please refer to the *SIMS System Manager* handbook.

For a list of the permissions available for each release, please refer to the appropriate permissions spreadsheet, which can be found on our SupportNet website (<http://support.capitaes.co.uk>) by entering PERMLIST in the **Site Search** field on the SupportNet Home page then clicking the **Go** button.

What Version of SIMS is Required?

In order to run the School Census Autumn 2011 Return, you must have the SIMS 2011 Summer Release (7.140) or later installed.

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

The version should read 7.140 or later.



Importing Filesets

Applicable to the Personnel Officer, Returns Manager and System Manager only

A Fileset contains the following:

- files used to determine the information to be collected in the return
- updates to the Validation Errors Summary (derived from files supplied by the Statutory Body)
- updates to the Summary report (derived from files supplied by the Statutory Body)
- updates to detail reports
SIMS provides detail reports to enable the checking of data used to generate the return. These report files are included as part of a SIMS release.

Occasionally, additions or corrections are made to these files, after a SIMS release, which are required for the forthcoming return. The Import Fileset functionality is provided to enable these files to be imported into SIMS by the Personnel Officer, Returns Manager or System Manager between SIMS releases. For more information, please see *Permissions Required* on page 3.



IMPORTANT NOTE: *The report files are not always updated between releases. Therefore, it is not always necessary to use the Import Fileset routine. Schools will be informed if a new file set is needed.*

If revised files are supplied, the fileset will be available as a .ZIP file, which should be downloaded from Capitaess website, unzipped, then imported into the SIMS Document Management Server (DMS) via **Tools | Setups | Import Fileset**. Ensure that the DMS is configured correctly before attempting to import the files.



TIP: *To check which version of the fileset is currently in use, select **Routines | Statutory Returns | <census name>**, select a return then run the Create and Validate routine. The **Validation Fileset ID** is displayed on the left-hand side of the **Validation Errors Summary** panel header. For information about the latest available Fileset version, please check the *School Census Autumn 2011 News Feed on SupportNet*.*

Type	Sequence	Message	Location	Solution
F	1542	Pupil actual year group not a recognised value	UPN : D820200106043 Surname : Smiles Forename : Sophie	# Go to FocusStudentStu
F	11035	NYearActual must be present	UPN : D820200106043 Surname : Smiles Forename : Sophie	# Go to FocusStudentStu
Q	6009Q	Please check: Sessions Attended is 0	UPN : L820200106096 Surname : Bradshaw Forename : Jonn	# Go to Focus Attendanc
Q	6009Q	Please check: Sessions Attended is 0	UPN : Z820200106102 Surname : Flowers Forename : Lilly	# Go to Focus Attendance (or Lesson Monitor) Deal with Missi
Q	6009Q	Please check: Sessions Attended is 0	UPN : W820200106100 Surname : Cerveira Forename : Pedi	# Go to Focus Attendance (or Lesson Monitor) Deal with Missi
Q	6009Q	Please check: Sessions Attended is 0	UPN : A820200106097 Surname : Bukob Forename : Kwotal	# Go to Focus Attendance (or Lesson Monitor) Deal with Missi

Before Importing the Revised Files

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

If the connection is unsuccessful, check the following details:

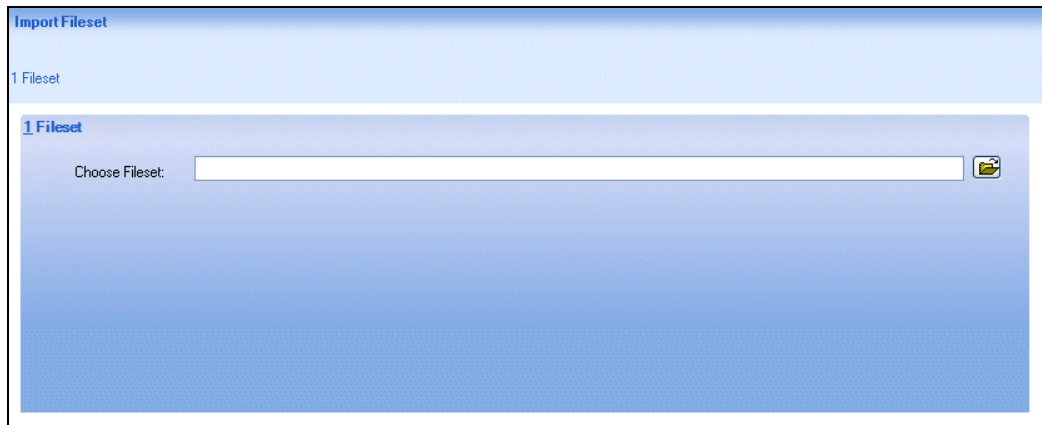
- The **Protocol** field defaults to **http** and should not be edited.
- The **Computer name** should be the name/number of the PC on which the DMS is installed.
- The **Port** number is usually 8080. The number must be between 0 and 65535.
- The **Active** check box must be selected, indicating that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

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

For more information, please refer to the *Setting up and Administering SIMS* handbook.

Importing the Revised Files

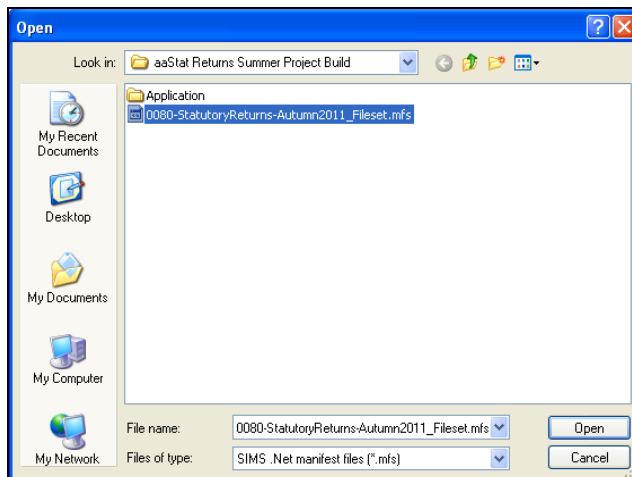
1. If revised files are supplied, download the required .ZIP file from SupportNet to a folder of your choice. The SupportNet resource number is quoted in the associated news item.
2. Unzip the .ZIP file to a folder of your choice.
3. In SIMS, select **Tools | Setups | Import Fileset** to display the **Import Fileset** page.



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



NOTE: The following graphics show example data only.

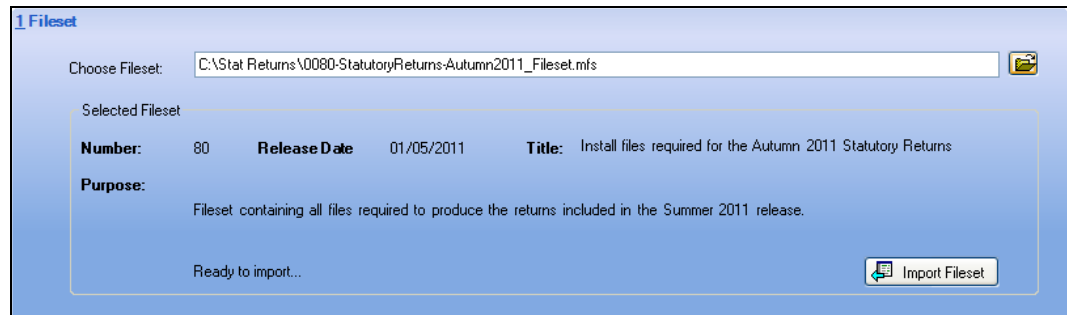


5. Navigate to the location of the unzipped fileset. The file name is made up of the following data fields: <Fileset Number>-<Census Name><Term and Year>Fileset.mfs.

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



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



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

- Click the **Import Fileset** button to import the fileset into the DMS. When the import process is finished, **Import complete** is displayed at the bottom left-hand side of the **Fileset** panel.
- After installing the fileset, close SIMS then re-open to ensure that the new data takes effect.
- Run the return in the usual way.



NOTE: *A fileset can be re-imported if, during the previous import, the data corrupted, for example.*

Overview of the School Census Autumn 2011 Return Process

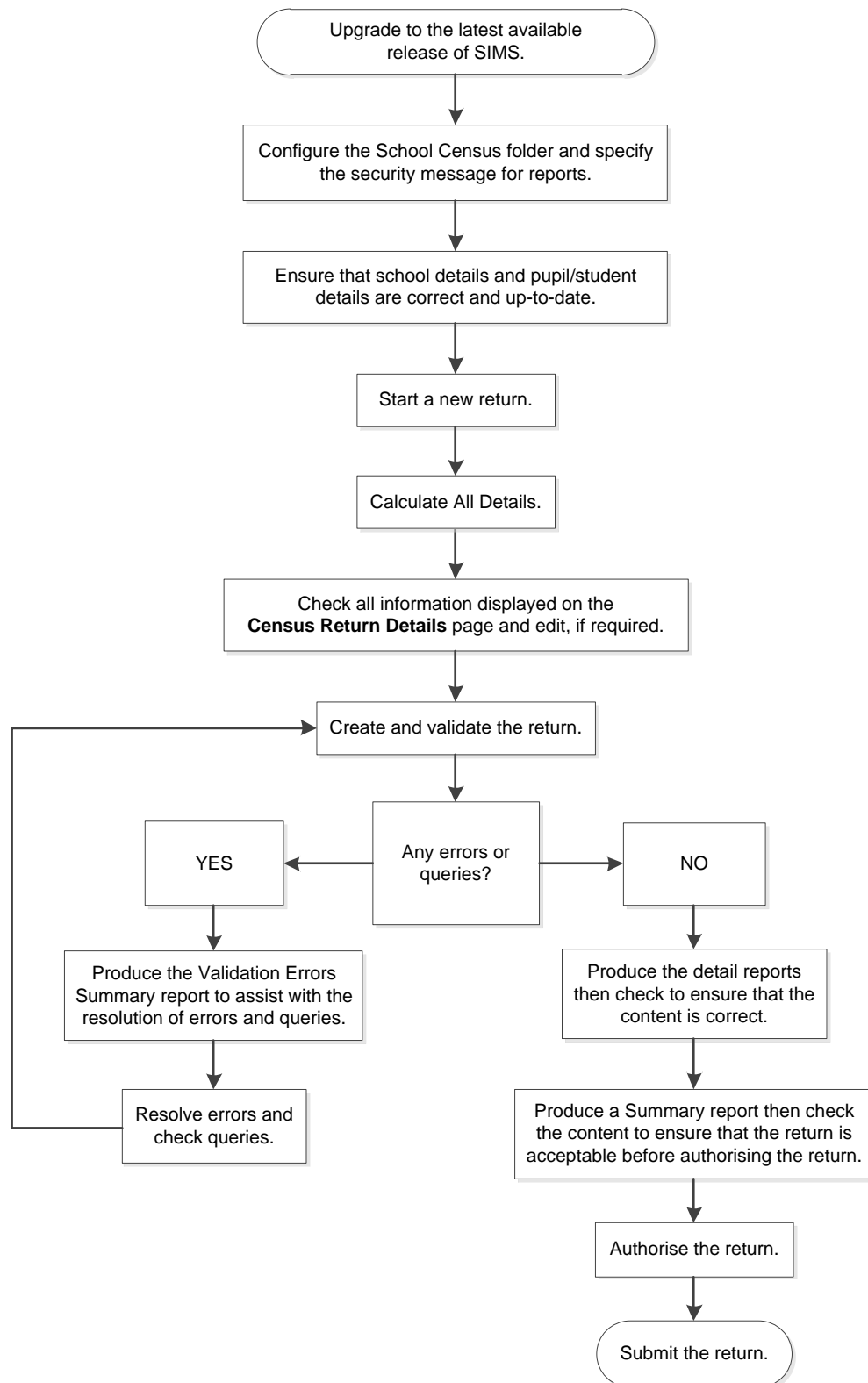
The following list provides a brief outline of the steps involved in producing the School Census return. If data has been regularly and accurately maintained, many of the activities in this document are unnecessary. However, it is advisable to check that the data is up-to-date.

1. Upgrade to the SIMS 2011 Summer Release (SIMS 7.140) or later.
2. Carry out one or more dry runs to identify any errors that may exist in your data.
3. Ensure that the relevant student and school data exists in SIMS and that it is complete and correct. Use the SIMS Bulk Update routine (**Routines | Student | Bulk Update**) to correct missing/invalid data as required.
4. Complete the required information on the **Census Return Details** page.
 - Enter non-student data if applicable.
5. Create and Validate the return.
6. Resolve any errors/queries then create and validate the return again.

Repeat the resolving of errors/queries and creating and validating the return routine until you are satisfied that the content of the return is correct.

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

7. Provide the Head Teacher with the latest copy of the Summary report to enable them to check the report details and to authorise the return.
8. Once approval has been given, authorise the return (**Routines | Statutory Returns | School Census – Authorise** button).
9. Submit the return to IMRS.



02 | Carrying out a Dry Run

Why Carry out a Dry Run?

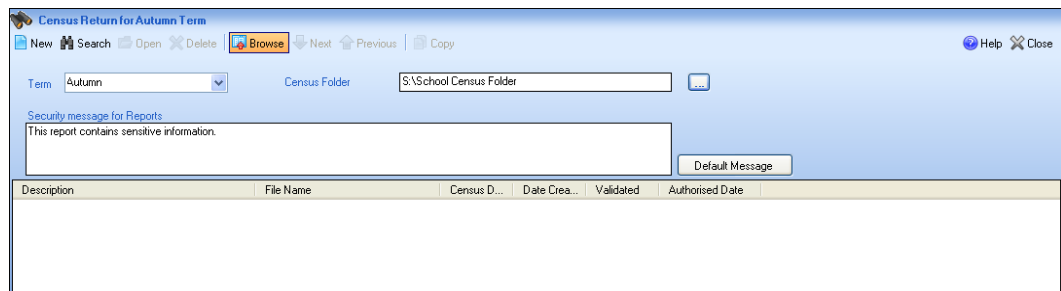
When the SIMS 2011 Summer Release (SIMS 7.140) has been installed, you can carry out one or more dry runs of the School Census Autumn 2011 Return.

The purpose of a dry run is to produce the Validation Errors Summary, which details the corrections that need to be made to your data. It is advisable to do this as early as possible, even if you know that your data has not yet been fully prepared or checked.

Whilst a significant number of errors may be generated, many of the errors that relate to students, e.g. language, SEN provision type, etc. can be fixed quickly using the Bulk Update functionality. For more information, please see *Updating Information Using Bulk Update* on page 21.

The Dry Run Process

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



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



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

Consider which users have access to the chosen folder, especially if the folder is shared on a server. The DfE recommends ISO27001 as the standard for information security, a copy of which can be found at <http://www.itgovernance.co.uk/bs7799.aspx>. If you are in any doubt, you should consult with your IT Security Officer before proceeding.

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

- 4) By default, the return **Description** is displayed as **School Census Autumn 2011**. Edit the **Description** to any name that will clearly distinguish this dry run from the actual return, which will be generated later, e.g. Autumn11Test.
- 5) In the **Census Details** panel, click the **Calculate All Details** button to extract the required information from SIMS and display the results in the various panels of the **Census Return Details** page.



NOTE: If more than one authorised return exists for the School Census Summer 2011, the **Update Learning Aims** panel is not populated automatically. You must select the relevant authorised return as follows:

- a) Click the **Open** button (located on the top right-hand side of the **Update Learning Aims** panel) to display the **Authorised Summer Census Returns** dialog.
- b) Highlight the required return then click the **OK** button to return to the **Update Learning Aims** panel, where the Summer 2011 Census Learning Aims information is displayed.

- 6) If there is any missing or invalid data, an error message is displayed on the Status Bar. This data must be added/corrected before you can create and validate the return.



More Information:

Detailed information about completing the individual panels on the **Census Return Details** page is available in the *Producing the School Census Autumn 2011 Return (English Secondary/Middle deemed Secondary Schools)* handbook.

Creating and Validating the Return

1. Click the **Create & Validate** button to start the process. This may take some time. Any missing or invalid data is listed in the **Validation Errors Summary** panel, located at the bottom of the page.

Type	Sequence	Message	Location	Solution
F	140	No completion times provided		# Go to link "Survey C...
F	1542	Pupil actual year group not a recognised value	UPN : D820200106043 Surname : Smiles Forename : Sophie	# Go to FocusStudent...
F	11017	CompleterRole must be present	CompleterRole :	# Go to link "Survey C...
F	11018	Hours must be present	Hours :	# Go to link "Survey C...
F	11035	NCYearActual must be present	UPN : D820200106043 Surname : Smiles Forename : Sophie	# Go to FocusStudentStudent Details Registration panel an...
Q	6009Q	Please check: Sessions Attended is 0	UPN : F820200106106 Surname : Gorman Forename : Micha	# Go to Focus Attendance (or Lesson Monitor) Deal with M...
Q	6009Q	Please check: Sessions Attended is 0	UPN : Z820200106102 Surname : Flowers Forename : Lilly	# Go to Focus Attendance (or Lesson Monitor) Deal with M...
Q	6009Q	Please check: Sessions Attended is 0	UPN : W820200106100 Surname : Cerqueira Forename : Pedr	# Go to Focus Attendance (or Lesson Monitor) Deal with M...
Q	6009Q	Please check: Sessions Attended is 0	UPN : A820200106097 Surname : Bukoil Forename : Kystal	# Go to Focus Attendance (or Lesson Monitor) Deal with M...
Q	6009Q	Please check: Sessions Attended is 0	UPN : L820200106096 Surname : Bradshaw Forename : Jonn	# Go to Focus Attendance (or Lesson Monitor) Deal with M...
Q	6009Q	Please check: Sessions Attended is 0	UPN : Z820200106049 Surname : Torral Forename : Pura	# Go to Focus Attendance (or Lesson Monitor) Deal with M...

The **Validation Errors Summary** panel header displays the number of errors and queries found during the Create and Validate process. The **Validation Fileset ID**, which indicates the version of the DfE fileset currently in use, is also shown (for information only).

Details about the errors and queries that have been found are displayed in the following columns:

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

To assist in the resolution of any errors and queries:

- Use the **Validation Search** to display the required error or query you want to view. This is achieved by selecting **ALL**, **ERRORS**, **QUERIES** or the required number from the drop-down list.

Type	Sequence	Message	Location	Solution
F	1500	UPN missing	Name: Cruise, Haryl Date of Birth: 1994-11-11, MaleUPN:	# Go to FocusStudentDetails Ethnic/Cultural panel and
F	1500	UPN missing	Name: Maise, John Date of Birth: 1994-10-03, MaleUPN:	# Go to FocusStudentDetails Ethnic/Cultural panel and
F	1630	Pupil aged 5 and over with ethnic group missing or invalid	Name: Abbey, John Date of Birth: 1995-09-07, MaleUPN: P82952	# Go to FocusStudentDetails Ethnic/Cultural panel and
F	1710	Source of pupil's ethnic group is missing or invalid	Name: Blackmore, Tyrone Date of Birth: 1995-03-02, MaleUPN	# Go to FocusStudentDetails Ethnic/Cultural panel and

- When **ALL** errors and queries are selected, the errors are displayed at the top of the list by default. Use the scroll bar located on the right-hand side of the panel to view all items.

Type	Sequence	Message	Location	Solution
F	1542	Pupil actual year group not a recognised value	UPN : D820200106043 Surname : Smiles Forename : Sophie	# Go to FocusStudentDetails Registration panel and edit
F	11035	NYearActual must be present	UPN : D820200106043 Surname : Smiles Forename : Sophie	# Go to FocusStudentDetails Registration panel and edit
Q	6009Q	Please check: Sessions Attended is 0	UPN : L820200106096 Surname : Bradshaw Forename : Jonn	# Go to Focus Attendance Deal with Missi
Q	6009Q	Please check: Sessions Attended is 0	UPN : Z820200106102 Surname : Flowers Forename : Lilly	# Go to Focus Attendance (or Lesson Monitor) Deal with Missi
Q	6009Q	Please check: Sessions Attended is 0	UPN : W820200106100 Surname : Cerveira Forename : Pedr	# Go to Focus Attendance (or Lesson Monitor) Deal with Missi
Q	6009Q	Please check: Sessions Attended is 0	UPN : A820200106097 Surname : Rukull Forename : Krestal	# Go to Focus Attendance (or Lesson Monitor) Deal with Missi

- When the pointer is hovered over a **Message**, **Location** or **Solution** cell, hover help displays the entire content of that cell.
- When the 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 problem can be checked.

Message	Location	Solution
...e present	CompleterRole :	# Go to link "Survey Completion" panel, and make sure there is a
...p not a recognised value	UPN : D820200106043 Surname : Smiles Forename : Sophie	# Go to FocusStudentDetails Registration panel and edit
...ns Attended is 0	UPN : P820200106013 Surname : Edwards Forename : Fiona	# Go to Focus Attendance (or Lesson Monitor) Deal with Missi
...ns Attended is 0	UPN : P820200106013 Surname : Edwards Forename : Fiona DateOfBirth : 2003-03-03 Gender : F SessionsAttended : 0	# Go to Focus Attendance (or Lesson Monitor) Deal with Missi
...ns Attended is 0	UPN : Q820200106004 Surname : Bradbury Forename : Chris	# Go to Focus Attendance (or Lesson Monitor) Deal with Missi
...ns Attended is 0	UPN : H820200106007 Surname : Burns Forename : Janet D	# Go to Focus Attendance (or Lesson Monitor) Deal with Missi



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/corrected.

- Change the order of the summary by clicking the appropriate column heading. If required, change the width of the columns by dragging the dividing line between the column headings until the required size is achieved.

- View a summary of errors/queries by clicking the **Report** button, located above the **Validation Errors Summary** panel. The summary is displayed in a web browser, e.g. Windows® Internet Explorer, from where it can be printed.

The details of the **Validation Errors Summary** can also be transferred to another application, if required.

The errors and queries are displayed until they are resolved and the Create and Validate process is run again. 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.

If at any point you wish to hide the list of errors 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 student related errors generated can be fixed quickly using Bulk Update (**Routines | Student | Bulk Update**). For more information, please see *Updating Information Using the Bulk Update Process* on page 21.



NOTE: All errors must be resolved and all queries must be investigated unless specific instructions to the contrary are received from your LA.

In addition to the Validation Errors Summary, the *School Census 2011 Errors and Resolutions* document, which includes explanations and information on how to resolve the errors, can be accessed on our SupportNet website (<http://support.capitaes.co.uk>) by entering CENSUS11 in the **Site Search** field on the Home page then clicking the **Go** button. Please check SupportNet on a regular basis because documents will be posted as soon as they become available.

As soon as the return has been created and validated, the reports can be run.

Producing Detail Reports

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

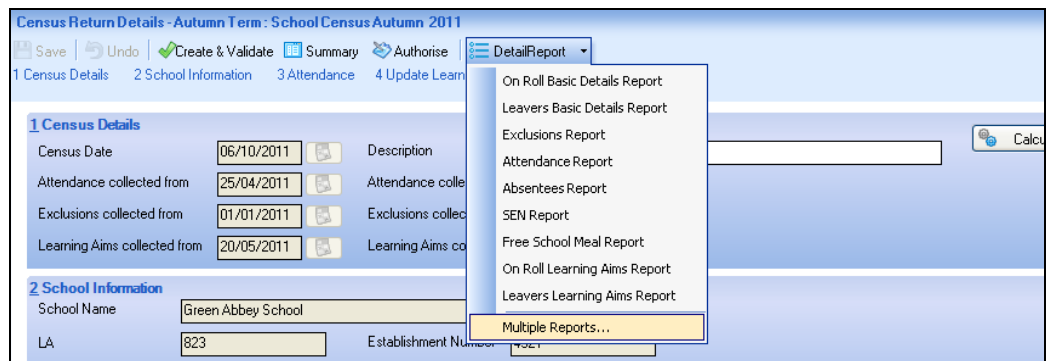
The following reports are currently available:

- On Roll Basic Details Report
- Leavers Basic Details Report
- Exclusions Report
- Attendance Report
- Absentees Report
- SEN Report
- Free School Meal Report
- On Roll Learning Aims Report
- Leavers Learning Aims Report.

Generating Detail Reports

To select a single detail report:

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



To select multiple detail reports:

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

The report(s) are saved automatically in the folder specified in the **Census Return for Autumn Term** browser, e.g. S:\SCHOOL CENSUS.



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

☐ **Completed**

03 | Preparing School Level Information

Checking Establishment Details

The following establishment details are required for the School Census Autumn 2011 Return and therefore need to be checked to ensure that they are correct in SIMS:

- **School Name**
- **School Type**
- **School Governance**
- **Intake Type**
- **Gender on entry to school** (not applicable to Middle deemed Secondary schools)
- **Gender on entry to 6th form** (not applicable to Middle deemed Secondary schools).

The following read-only items are also collected for the School Census Autumn 2011 Return. Please contact dotict helpdesk on 01604 824999 if the information displayed is incorrect.

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

1. Select **Focus | School | School Details** to display the **School Details** page.
2. Check that the details displayed in the **Establishment** panel are correct.

1 Establishment

School Name: Green Abbey School

LA: 923 Central Bedfordshire

Establishment Number: 4321

Unique Reference Number: [Empty]

School Phase: Secondary

School Type: Comprehensive all-through 11-18

School Governance: Community

Intake Type: Comprehensive

Boarding Pupils:

Nursery Class:

Special Class or Unit:

Head Teacher: Mr Adrian Blacker

Main Contact: Mr Adrian Blacker

Curriculum Years: 7, 13

Pupil Genders: Coeducational

Gender on entry to school: Coeducational

Gender on entry to 6th form: Coeducational

NC Year Start Date (dd/mm): 1 / 9

School Specialism:

- Arts
- Business and Enterprise
- Engineering
- Humanities

Extended Services:

- Before school childcare and/or activities for school-age children (term-time)
- After school childcare and/or activities for school-age children (term-time)
- Childcare and/or activities, for school-age children during school holidays
- Childcare integrated with a nursery education place for three and four year ol...

No. of Childcare Places: 0

3. Ensure that the **School Name** has been entered correctly.
4. Ensure that the **School Type**, **School Governance** and **Intake Type** have been selected correctly.



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



5. Check the entries in the **Curriculum Years** fields. If the lowest and highest National Curriculum years are incorrect, please contact your Local Support Team for assistance.
6. Ensure that the **Gender on entry to school** and **Gender on entry to 6th form** are selected correctly. (not applicable to Middle deemed Secondary schools.)
7. Click the **Save** button to save any changes, if applicable.

Completed

Checking Telephone and Email Information

The following school contact details are collected for the School Census Autumn 2011 Return and therefore need to be checked to ensure that they are up-to-date and correct:

- **Email Address**
 - **Telephone Number**
1. Select **Focus | School | School Details** to display the **School Details** page.
 2. Click the **Contact Details** hyperlink to display the **Contact Details** panel.

3 Contact Details			
Telephone	<input type="text" value="01234 1851234"/>	Fax	<input type="text" value="01234786542"/>
Email	<input type="text" value="office@ga.org.uk"/> 	Website	<input type="text" value="http://www.greebbeyschool.co.uk"/> 

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

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

 **Completed**

04 | Preparing Student Level Information

Checking/Correcting Student Details

Before beginning the School Census return, ensure that all current students are included in SIMS and that as far as possible, the information is up-to-date and accurate.

Ensure that:

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



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

- any duplicate or unwanted student records have been deleted.
- UPNs have been checked/entered as required.
- the Unique Learner Numbers (ULNs) are entered for all students aged 14 and over.
- part-time details have been checked/updated.
- the National Curriculum Year Group (Year Taught In) is correct.
- free school meal eligibility has been updated.
- first language information has been recorded.
- Connexions assent has been recorded/updated.
- Special Educational Needs information is up-to-date.
- gifted and talented information has been recorded (or removed) for applicable students.
- exclusions information has been updated.
- attendance records have been updated.
- Learning Aims information is up-to-date for Post 16 students.

The following sections provide additional information and specific instructions on checking and completing Student Level data. Some of this data can be checked/updated using Bulk Update. For more information, please see *Updating Information Using the Bulk Update Process* on page 22.

If you have already upgraded to the SIMS 2011 Summer Release (SIMS 7.140), it is strongly recommended that one or more dry runs are carried out in order to identify the validation errors and queries that need to be resolved. For more information, please see *Carrying out a Dry Run* on page 11.

Updating Information Using the Bulk Update Process

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

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

1. Select **Routines | Student | Bulk Update** to display the **Bulk update Student** page.

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

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

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

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

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

Group Type	Group	Data Item	Comment
First Language	<NONE>	First Language	Identifies students who do not have a First Language recorded. Can also be used to change existing values as required.
SEN Status	Statemented	SEN Provision Type	Lists students with an SEN Status of S enabling the SEN Provision to be selected.
SEN Status	School Action Plus	SEN Provision Type	Lists students with an SEN Status of P enabling the SEN Provision to be selected.
Year Group	Year 8 (and above)	Connexions Assent	Searches for any students who do not have a value selected in the Connexions Assent drop-down. This must be completed for the School Census.

- The **Effective Date** is the date on which the membership of the group is based and defaults to today's date. This can be changed to the start of the academic year, for example, to display students who were on-roll on that date.
- In the **Update Data Item** panel, select the required **Data Item** from the drop-down list, e.g. **English Additional Language**. The **Effective Date** in this panel is used to determine the date when the change will become effective and defaults to today's date. In most circumstances, it is best to change this date to the start of the academic year because most data recorded is applicable from the start of the academic year.

The screenshot shows a 'Bulk Update' window with two main sections: 'Student Population' and 'Update Data Item'.
 In the 'Student Population' section:
 - 'Group Type' is set to 'Year Group' (dropdown menu).
 - 'Group' is set to '<ANY>' (dropdown menu with an ellipsis icon).
 - 'Effective Date' is set to '20/06/2011' (text input with a calendar icon).
 In the 'Update Data Item' section:
 - 'Data Item' is set to 'First Language' (dropdown menu).
 - 'Effective Date' is set to '20/06/2011' (text input with a calendar icon).

When the required criteria have been selected, click the **Search** button to display the **Members** panel, which displays a list of students matching the chosen criteria and the choice of **First Language** types.

Bulk Update First Language - Year Group (ANY) [20/06/2011]												
1 Members												
Name	Year Group	Assigned	Acholi	Adangme	Afar-Saho	Afrikaans	Akan/Twi/Fa...	Albanian/Sh...	Alur	Ambo/Oshiw...	Amharic	Arabic
Abbot, Jimmy	8	English										
Abbot, Claire	9	English										
Abbot, Clarissa	11	English										
Abbot, Hannah	7	English										
Abbot, James	10	English										
Abbot, Susan	8	English										
Abdelkoder, Mohamed	12	English										
Able, Benjamin	11	English										
Abu-Koash, Frederik	11	Serbian/Croatian/...										
Ackroyd, Marc	10	English										
Ackroyd, Mary	10	English										
Adair, Geoffrey	11	English										
Adams, James	12	English										
Adams, Kathryn	9	English										
Adams, Louise	11	English										
Adams, Melanie	7	English										
Adams, Owen	12	English										
Addison, Avie	11	English										
Addison, Graham	11	English										
Addison, Millie	10	English										
Adey, Marc	10	English										
Adkins, Richard	7	English										
Agathocleous, George	11	Greek										
Agathocleous, Sulvina	11	Greek										
Ahmad, Arfa	11	Urdu										
Ahmed, Mohan	11	English										
Ainsworth, Alison	7	English										
Ainsworth, Zoe	8	English										
Aitken, Nigel	11	English										
Akhtar, Amanat	11	Urdu										
Akhtar, Mina	11	Urdu										
Total	916		916	0	0	0	0	1	1	0	0	0



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

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

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

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

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

Name	Year Group	Assigned	Dutch/Flemi...	Dzongkha/B...	Ebira	Edo/Bini	Efik-Ibibio	English	Esan/Ishan	Estonian	Ewe	Ewe
Abbey, Jimmy	8	English						✓				
Abbot, Claire	9	English						✓				
Abbot, Claissa	11	English						✓				
Abbot, Hannah	7	English						✓				
Abbot, James	10	English						✓				
Abbot, Susan	8	English						✓				
Abdelkoder, Mohamed	12	English						✓				
Able, Benjamin	11	English						✓				
Abu-Koash, Frederik	11	English						✓				
Ackroyd, Marc	10	English						✓				
Ackroyd, Mary	10	English						✓				
Adair, Geoffrey	11	English						✓				
Adams, James	12	English						✓				
Adams, Kelvin	9	English						✓				

3. Edit the exceptions by clicking in the cell associated with the individual student and their status, e.g. Marc Ackroyd's first language is Dutch.

Name	Year Group	Assigned	Dutch/Flemi...	Dzongkha/B...	Ebira	Edo/Bini	Efik-Ibibio	English	Esan/Ishan	Estonian	Ewe	Ewe
Abbey, Jimmy	8	English						✓				
Abbot, Claire	9	English						✓				
Abbot, Claissa	11	English						✓				
Abbot, Hannah	7	English						✓				
Abbot, James	10	English						✓				
Abbot, Susan	8	English						✓				
Abdelkoder, Mohamed	12	Pahari (Pakistan)						✓				
Able, Benjamin	11	English						✓				
Abu-Koash, Frederik	11	English						✓				
Ackroyd, Marc	10	Dutch/Flemish	✓					✓				
Ackroyd, Mary	10	English						✓				
Adair, Geoffrey	11	English						✓				
Adams, James	12	English						✓				
Adams, Kelvin	9	English						✓				

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

Bulk Updating Data for a Selection of Students

It is also possible to bulk edit data for a selection of students as follows:


- Hold down the **Ctrl** key and click the row of each required student to highlight them. Release the **Ctrl** key, then click one of the highlighted cells in the required column. A tick indicates that the student has been selected.
- To enter values for sequentially listed students, click the first student, hold down the **Shift** key then click the last student in the list (alternatively, hold down the **Shift** key and press the **Down Arrow** key). Release the **Shift** key then click one of the highlighted cells in the required column. A tick indicates that the student has been selected.

Checking/Correcting a Student's Basic Details

Ensure that the basic information is up-to-date and correct. It may be necessary to make changes for a number of reasons, e.g. to correct inaccurately entered information, legal adoption, change of legal surname, etc.

The following information is collected in the return:

- **Legal Forename** (mandatory information in SIMS)
 - **Middle Names**
 - **Legal Surname** (mandatory information in SIMS)
 - **Former Surname**
 - **Preferred Surname** (mandatory information in SIMS)
 - **Gender** (mandatory information in SIMS)
 - **Date of Birth** (mandatory information in SIMS).
1. Select **Focus | Student | Student Details** to display the **Find Student** browser.
 2. Search for then double-click the name of the required student to display the **Student Details** page.

1 Basic Details		Photograph
Legal Forename	Benjamin	 <input type="button" value="Add"/> <input type="button" value="Remove"/> <input type="button" value="History"/>
Middle Name(s)	Michael	
Legal Surname	Abbot	
Preferred Surname	Abbot	
Preferred Forename	Ben	
Date of birth	12/07/1993	
Age	16 years, 10 months	
Gender	Male	
Birth Certificate Seen	<input checked="" type="checkbox"/>	
<input type="button" value="Quick Note"/>		

3. Check that all the details displayed in the **Basic Details** panel are up-to-date and correct, paying particular attention to the data collected in the return.
4. If you have made any changes, click the **Save** button.

Recording a Students Change of Surname

It is a requirement of the School Census Autumn 2011 Return that a history of students' previous surname(s) is recorded.

1. In the **Basic Details** panel, edit the student's **Legal Surname**.

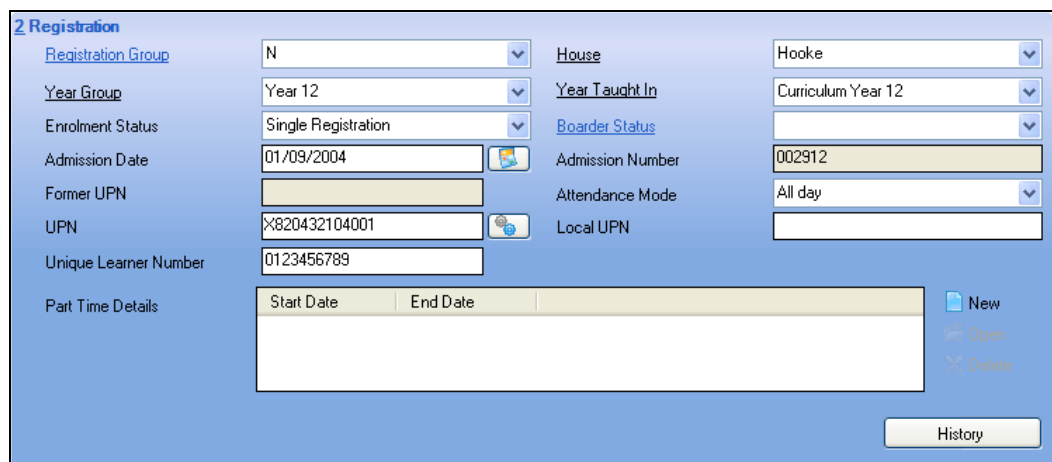
2. Click the **Save** button. The following message is displayed:
**Is a correction to the name or a legal change to the student’s name?
 If it is a legal change, please select Yes.**
3. Click the **Yes** button to display the **Reason For Change** dialog.
4. Select the **Reason** for change from the drop-down list. This entry is optional but is recommended to maintain a complete history of name changes.
5. The **Date of Change** defaults to today's date but can be amended by clicking the **Calendar** button and selecting an alternative date, if required.
6. Click the **OK** button to return to the **Basic Details** panel.
7. Click the **Save** button.

 **Completed**

Checking Enrolment Status, Admission Date and Boarder Status

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

- **Enrolment Status** (mandatory information in SIMS)
 - **Admission Date** (mandatory information in SIMS)
 - **Boarder Status.**
1. Select **Focus | Student | Student Details** to display the **Find Student** browser.
 2. Search for then double-click the name of the required student to display the **Student Details** page.
 3. Click the **Registration** hyperlink to display the **Registration** panel.



2 Registration

<u>Registration Group</u>	N	<u>House</u>	Hooke				
<u>Year Group</u>	Year 12	<u>Year Taught In</u>	Curriculum Year 12				
<u>Enrolment Status</u>	Single Registration	<u>Boarder Status</u>					
<u>Admission Date</u>	01/09/2004	<u>Admission Number</u>	002912				
<u>Former UPN</u>		<u>Attendance Mode</u>	All day				
<u>UPN</u>	X820432104001	<u>Local UPN</u>					
<u>Unique Learner Number</u>	0123456789						
<u>Part Time Details</u>	<table border="1"> <thead> <tr> <th>Start Date</th> <th>End Date</th> </tr> </thead> <tbody> <tr> <td> </td> <td> </td> </tr> </tbody> </table>		Start Date	End Date			<input type="button" value="New"/> <input type="button" value="Open"/> <input type="button" value="Delete"/>
Start Date	End Date						
			<input type="button" value="History"/>				

4. Check the student’s **Enrolment Status**. Select the correct enrolment status from the drop-down list, if required.

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

Completed

Checking/Correcting UPNs

The following information is collected in the return:

- **UPN**
- **Former UPN** (this is a read-only field, which is automatically populated if the UPN is changed).

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

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

2 Registration

Registration Group	N	House	Hooke				
Year Group	Year 12	Year Taught In	Curriculum Year 12				
Enrolment Status	Single Registration	Boarder Status					
Admission Date	01/09/2004	Admission Number	002912				
Former UPN		Attendance Mode	All day				
UPN	X820432104001	Local UPN					
Unique Learner Number	0123456789						
Part Time Details	<table border="1"> <thead> <tr> <th>Start Date</th> <th>End Date</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> </tr> </tbody> </table>		Start Date	End Date			<input type="button" value="New"/> <input type="button" value="Open"/> <input type="button" value="Delete"/>
Start Date	End Date						
			<input type="button" value="History"/>				

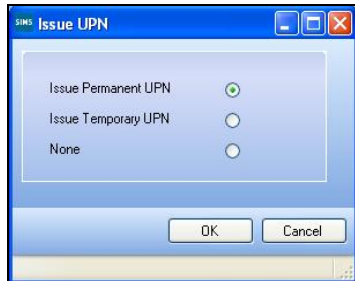
UPNs should be entered in the **UPN** field. Ensure that the format is valid (the field will turn red if invalid).

- **Permanent UPNs** are issued to a new student only when it is believed that they have never previously been allocated a UPN or to replace a temporary UPN. (Check with IMRS before issuing a permanent UPN)
- **Temporary UPNs** are issued to a student when the permanent UPN is not known to the school, e.g. awaiting transfer file/applicant's information. A temporary UPN can be recognised by the letter after the UPN number, e.g. H82020010701A.

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



Generate UPN button



- Select either the **Issue Permanent UPN** or **Issue Temporary UPN** radio button.
- Click the **OK** button to return to the **Registration** panel.
- Click the **Save** button to save any changes. The UPN is generated when the record is saved.

Completed

Checking/Correcting Unique Learner Numbers

A Unique Learner Number (ULN) is a 10-digit identifier that is retained and stays with the student's learning record throughout their lives. Currently, this applies to students over the age of 14 involved in UK education or training. The 14-19 Diploma is the main requirement for ULNs but Functional Skills and routine examination entry are also requesting their use.

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

- The new DfE ULN service (to upload a CTF file via a web page on the **S2S** website).
- The **Learner Registration Service** Web Portal (to obtain individual ULNs).
- The **Key to Success** website (<https://www.keytosuccess.education.gov.uk/>).

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

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

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

2 Registration

Registration Group: N

Year Group: Year 12

Enrolment Status: Single Registration

Admission Date: 01/09/2004

Former UPN: [Empty]

UPN: X820432104001

Unique Learner Number: 0123456789

House: Hooke

Year Taught In: Curriculum Year 12

Boarder Status: [Empty]

Admission Number: 002912

Attendance Mode: All day

Local UPN: [Empty]

Part Time Details:

Start Date	End Date

Buttons: New, Open, Delete, History

- Check the content of the **Unique Learner Number** field. Enter the 10-digit identifier, if not currently displayed.
- Click the **Save** button to save any changes, if applicable.

Completed

Checking/Correcting Part-Time Student Information

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

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

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

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

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

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

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

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

 **Completed**

Checking/Correcting the National Curriculum Year Group

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

The following table shows the Curriculum Year in which the students in England are expected to be taught, according to their date of birth (during the academic year 2011/2012):

Curriculum Year pupil would normally be taught in	Age Range	Date of birth range
N1	2 – 3	01/09/2008 to 31/08/2009
N2	3 – 4	01/09/2007 to 31/08/2008
R	4 – 5	01/09/2006 to 31/08/2007
1	5 – 6	01/09/2005 to 31/08/2006
2	6 – 7	01/09/2004 to 31/08/2005
3	7 – 8	01/09/2003 to 31/08/2004
4	8 – 9	01/09/2002 to 31/08/2003
5	9 – 10	01/09/2001 to 31/08/2002
6	10 – 11	01/09/2000 to 31/08/2001
7	11 – 12	01/09/1999 to 31/08/2000
8	12 – 13	01/09/1998 to 31/08/1999
9	13 – 14	01/09/1997 to 31/08/1998
10	14 – 15	01/09/1996 to 31/08/1997
11	15 – 16	01/09/1995 to 31/08/1996
12	16 – 17	01/09/1994 to 31/08/1995
13	17 – 18	01/09/1993 to 31/08/1994

There are three methods of checking this information in SIMS:

- via individual student records
- via the pastoral structure by curriculum year
- via the pastoral structure for the whole school.

These methods are described in the following sections.

Checking Individual Records:

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

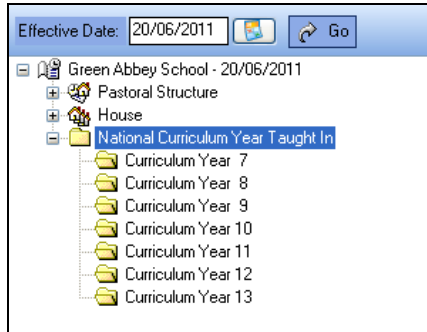
4. Check the **Year Taught In** to ensure that it is correct. If necessary, select the correct year from the drop-down list.

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

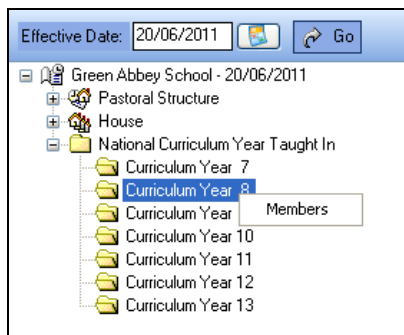
Checking the Year Taught In via the Pastoral Structure by Curriculum Year:

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

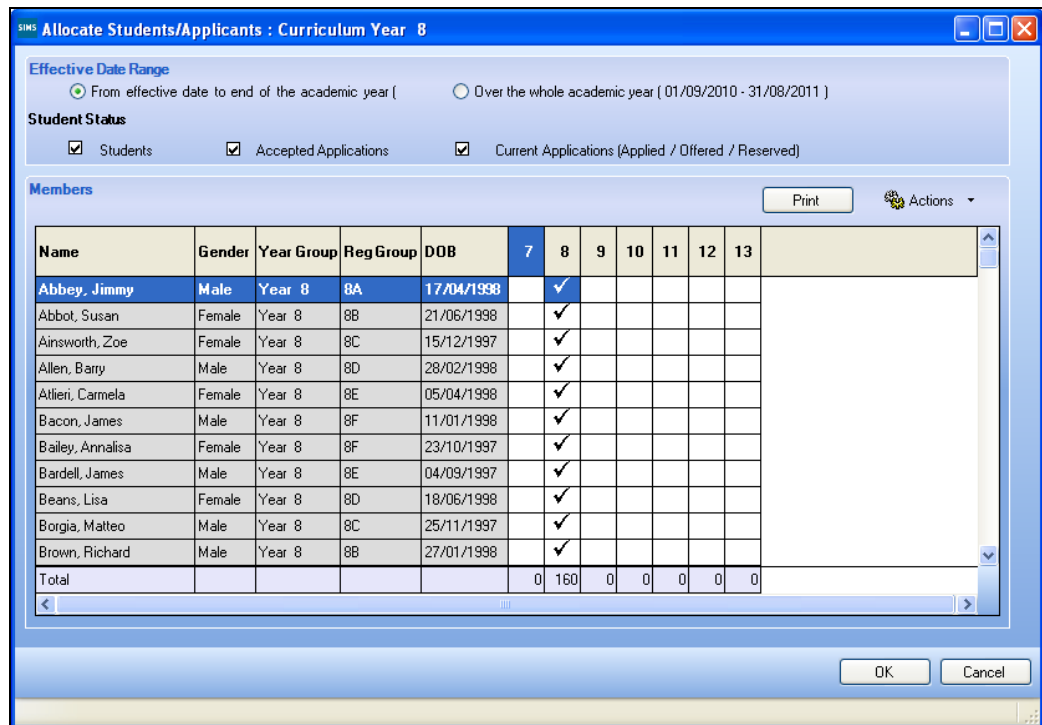
- Expand the **National Curriculum Year Taught In** folder by clicking the **+** icon or double-clicking the folder name. The curriculum years are displayed beneath.



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



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

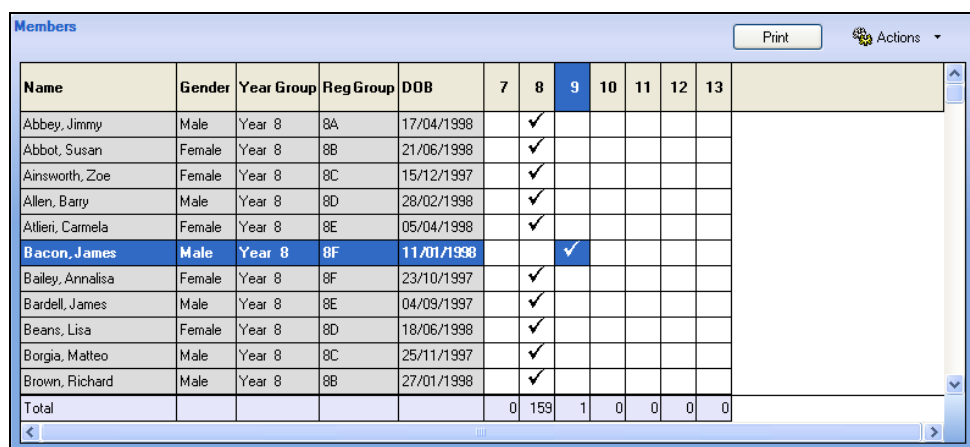


- Ensure that the **Effective Date Range** is changed to **Over the whole academic year** by selecting the appropriate radio button.
- Change the memberships of the curriculum year (**Year Taught In**) as required by clicking in the required cell in the grid.



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

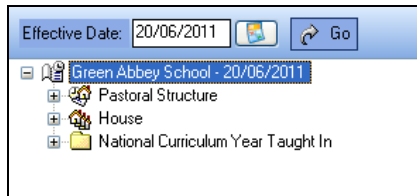
The following graphic shows that one student is taught in Year **9**.



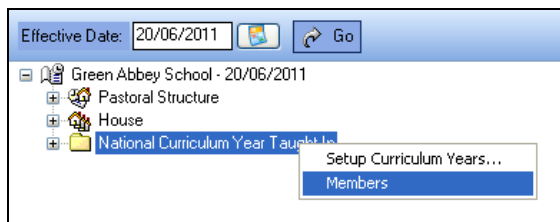
- Make any further changes then click the **OK** button to close the dialog.
- Repeat for the other curriculum years, if required.
- Click the **Save** button to save all the changes.

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

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



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



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

Name	Gender	Year Group	Reg Group	DOB	7	8	9	10	11	12	13
Abbot, Ben	Male	Year 13	N	12/07/1993							✓
Abbot, Claire	Female	Year 9	9A	22/04/1997			✓				
Abbot, Clarissa	Female	Year 11	11A	22/06/1995					✓		
Abbot, Hannah	Female	Year 7	7B	23/12/1998	✓						
Abbot, James	Male	Year 10	10C	27/04/1996				✓			
Abbot, Susan	Female	Year 8	8B	21/06/1998		✓					
Abdelkoder, Mohamed	Male	Year 12	P	15/03/1994						✓	
Able, Benjamin	Male	Year 11	11A	19/02/1995					✓		
Abu-Koash, Frederik	Male	Year 11	11C	05/08/1995					✓		
Ackroyd, Marcus	Male	Year 10	10B	21/08/1996				✓			
Total					160	160	163	95	166	103	109

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

By default, the order of the list is alphabetical by surname.

- Right-click the **Year Group** heading and select **Sort By** from the pop-up menu. Sorting the student names in year group order assists in finding in the grid any students who do not have a **Year Taught In** selected.

Members												
Name	Gender	Year Group	Reg Group	DOB	7	8	9	10	11	12	13	
Abbot, Hannah	Female	Year 7	7B	23/12/1998								
Adams, Melanie	Female	Year 7	7D	06/06/1999								
Adkins, Richard	Male	Year 7	7E	23/03/1999								
Ainsworth, Alison	Female	Year 7	7C	28/05/1999	✓							
Andrews, Bethany	Female	Year 7	7E	16/01/1999	✓							
Aperen, Alex	Female	Year 7	7E	16/06/1999	✓							
Ashworth, Imogen	Female	Year 7	7C	13/03/1999	✓							
Atkinson, Bridget	Female	Year 7	7F	23/08/1999	✓							
Austin, Shannon	Female	Year 7	7D	17/03/1999	✓							
Barbut, Rachel	Female	Year 7	7B	14/02/1999	✓							
Barnard, Andrew	Male	Year 7	7E	14/04/1999	✓							
Total					160	160	163	95	166	103	109	



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

- Indicate which year the students with missing data are taught in by clicking the appropriate cell in the grid.
- Make any required changes for the other students listed.
- Click the **OK** button then click the **Save** button to save the changes.

Completed

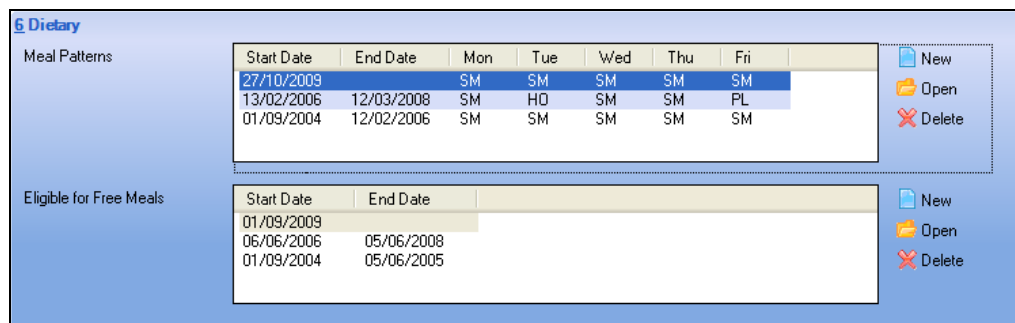
Checking Eligibility for Free School Meals

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

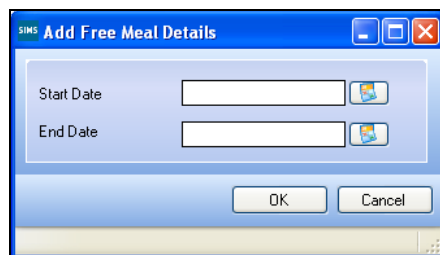
The free school meal eligibility **Start Date** must be entered, as this is the only mandatory information required for the School Census. An **End Date** is not mandatory for the census, but can be useful to enable reports to be produced that list when eligibility expires. To be included in the School Census, students must be eligible on census day. Therefore, the free school meal eligibility **End Date** must not be before the census date.

The **Meal Patterns** section is for information purposes only and does not need to be recorded.

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



4. Ensure the minimum of a **Start Date** is displayed in the **Eligible for Free Meals** panel. If a **Start Date** needs to be added, click the adjacent **New** button to display the **Add Free Meal Details** dialog.



5. Enter the **Start Date** (and **End Date** if available) for the free meal period, as supplied by your Local Authority.
6. Click the **OK** button to return to the **Dietary** panel, where the new information is displayed in the **Eligible for Free Meals** panel.
7. Click the **Save** button to save any changes.

Ensure that this data is checked/amended (as required) on a regular basis.

 **Completed**

Checking First Language Information

The language code for each student is collected in the return and therefore the language information entered in SIMS should be checked to ensure that it is correct:

- A First Language other than English should be recorded where a student was exposed to the language during early development and continues to be exposed to this language in the home or in the community.
 - If the child was exposed to more than one language (which may include English) during early development, the language other than English should be recorded, regardless of the student’s proficiency in English.
1. Select **Focus | Student | Student Details** then select the required student.
 2. Click the **Ethnic/Cultural** hyperlink to display the **Ethnic/Cultural** panel.

The screenshot shows the 'Ethnic/Cultural' panel with the following fields and values:

- Ethnicity:** White - English
- Home Language:** English
- First Language:** English
- Asylum Status:** (Empty dropdown)
- National Identity:** English
- Nationality and Passport Details:**
 - Nationality: (Empty text box)
 - Passport Number: (Empty text box)
 - Passport Expiry date: (Empty text box)
- Ethnic Data Source:** Provided by the parent
- Religion:** Other Religion
- English Additional Language:** No
- Traveller Status:** (Empty text box)
- Speaks Welsh:** (Empty dropdown)

Buttons: New, Open, Delete, History.

3. Select the required language from the **First Language** drop-down list.

Completed

Checking/Correcting Connexions Assent

Connexions is the Government's support service for all young people in England aged 12 to 25. It provides integrated advice, guidance and access to personal development opportunities. Before data can be shared with Connexions, schools are required to send parents a Fair Processing Notice (FPN), advising that data will be shared unless the parent withholds permission.

The **Connexions Assent** field indicates whether parents consent to student data being shared with Connexions has been obtained. This field should be checked to ensure that the correct information is collected in the return.

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

4. Indicate whether parent/guardians have given consent to student data being shared with Connexions by selecting from the **Connexions Assent** drop-down list. The following options are available:

- **Unsought:** School has not yet sent out Fair Processing Notices.

The number of students recorded as **Unsought**, e.g. new starters where the school has not yet had time to write to the parent/guardian, should be minimal.

- **Connexions Assent Obtained:** Permission has been given by the parent/guardian to share information about the student with Connexions.
- **Connexions Assent Refused:** Permission has been refused by the parent/guardian to share information about the student with Connexions.

- **Sought no Reply:** The school has sent out Fair Processing Notices but has not received a reply.

For information on how to check for any missing Connexions Assent data and to complete fields in bulk, please see *Updating Information Using Bulk Update* on page 21.

 **Completed**

Recording Leavers and Re-Admissions

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

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

Recording a Leaver

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

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

Name	Year Gr...	Reg. Gr...	Adm. No.	Date of Admiss...	Date of Lea...	Reason for Lea...	Destination
Abbey, David	10	10F	003269	03/09/2007			
Abbey, Jimmy	8	8A	003699	01/09/2009			
Abbot, Benjamin	13	N	002912	01/09/2004			
Abbot, Claire	9	9A	003460	02/09/2008			
Abbot, Clatissa	11	11A	003100	05/09/2006			
Abbot, Hannah	7	7B	003762	01/09/2010			
Abbot, James	10	10C	003270	03/09/2007			

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

Name	Year Gr...	Reg. Gr...	Adm. No.	Date of Admiss...	Date of Lea...	Reason for Leaving	Destination
Abbot, Hannah	7	7B	003762	01/09/2010			

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

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



IMPORTANT NOTE: *It is recommended that Year 11 students are not given a **Date of Leaving** until it is confirmed that they will actually be leaving the school at the end of the Summer term and are not returning to Year 12.*

*For students who stay on for Year 12, without a gap in learning from Year 11, the DfE expects their **Date of Admission** to be the same as it was when the student was in Year 11. It is also expected that no date of leaving was recorded for the end of Year 11.*

1 Leaving Information			
Date of Leaving	<input type="text" value="21/07/2010"/>	Reason for leaving	Junior/Primary to Secondary Pt
Destination after Leaving	<input type="text"/>		

6. Select the **Reason for Leaving** from the drop-down list, then either:
 - highlight the students to whom this information applies (using the **Ctrl** or **Shift** keys) and click the **Assign to Selected** button; or
 - if the information applies to all the students in the list, click the **Assign to All** button.
7. Enter the **Destination after Leaving** if known, then either:
 - highlight the students to whom this information applies (using the **Ctrl** or **Shift** keys) and click the **Assign to Selected** button; or
 - if the information applies to all the students in the list, click the **Assign to All** button.
8. To remove a student from the list, highlight their name then click the **Remove** button.
9. To clear the contents of the **Date of Leaving**, **Reason for leaving** and **Destination after Leaving** fields, highlight the required student(s) then click the **Clear** button. Re-enter the information as required.
10. Click the **Save** button.

Completed

Re-Admitting a Student

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



NOTE: Do not just remove the date of leaving, as this will not show a period of absence from the school.

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

1. Select **Focus | Student | Student Details** to display the **Find Student** browser.
2. Click the **New** button to display the **Add Student** page. It is necessary to enter limited information here as you know that the person already exists.
3. Click the **Continue** button to display a list of **Matched People**, based on the criteria entered on the **Add Student** page.
4. Highlight the required student then click the **Open** button. The following warning message is displayed:
The selected student is a leaver. Do you want to re-admit the student?
5. Click the **Yes** button if you are certain that this is the student who should be re-admitted. Their details are then displayed on the **Student Details** page.
6. Complete the mandatory fields (**Date of birth, Gender, Year Group, Enrolment Status, Year Taught In** and **Admission Date**) and check any other details that may have changed since they were last on-roll, such as their address. Ensure that the UPN is recovered or a new UPN generated, if it did not previously exist.
7. Click the **Save** button to re-admit the student.



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

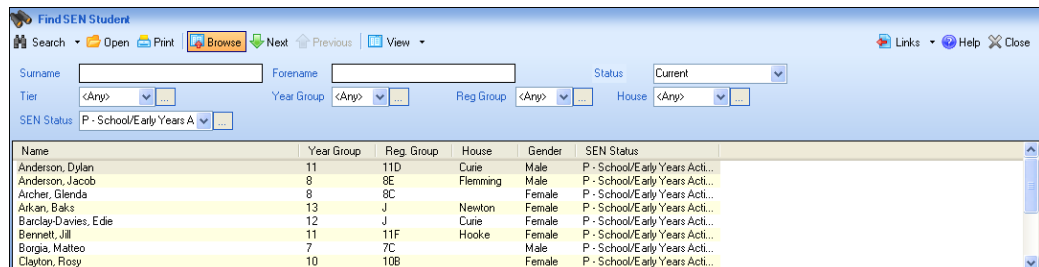
Completed

Checking/Correcting Special Educational Needs (SEN) Information

The SEN **Status** (known by the DfE as SEN Provision) is recorded for this return:

- **N - No Special Educational Need** (you are **not** required to enter an N for pupils with No special needs)
- **A - School/Early Years Action**
- **P - School/Early Years Action+**
- **S - Statement.**

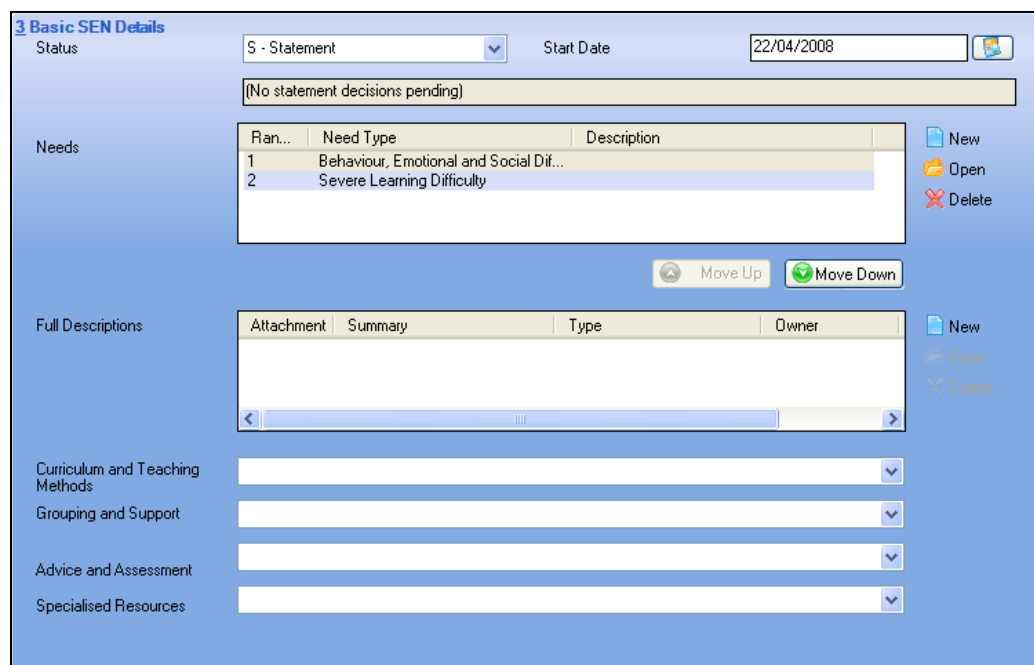
1. Select **Focus | Student | Special Educational Needs** to display the **Find SEN Student** browser.
2. Select the required **SEN Status** from the drop-down list then click the **Search** button to display a list of students who match the criteria.



3. Double-click the required student to display the **Student SEN details** page.
4. Check the details displayed in the **Basic SEN Details** panel, ensuring that the **Status** is correct. Select the correct **Status** from the drop-down list, if required.



NOTE: N - No Special Educational Need should be used only if a **SEN Status** was previously assigned but **A, P** and **S** are not currently relevant.





*NOTE: At least one Special Educational Need, e.g. **Visual Impairment**, must be recorded for all students with a SEN Status of **P - School/Early Years Action+** or **S - Statement**.*

5. Complete the other information, if required then click the **Save** button to save any changes.

Completed

Adding Gifted and Talented Students

If you have a Gifted and Talented or Able Students register, the students on the register should also be recorded in SIMS. Students on the register should include:

- all students in the Excellence in Cities (EiC) Gifted and Talented population, if you have one.
- all identified National Academy for Gifted and Talented Youth (NAGTY) members, if you have any.

Even if you do not have a Gifted and Talented register, any students who fit into either of the above categories should be recorded in SIMS.



*NOTE: Gifted and talented information need only be recorded for students to whom it applies. All other students are allocated a default value of **False**.*

Ensure that the gifted/talented **Start Date** is entered correctly, as this is collected in the School Census return.

1. Select **Focus | Student | Special Educational Needs** to display the **Find SEN Student** browser.
2. Search for then double-click the name of the required student to display the **Student SEN details** page.



*TIP: To filter the list of students to display only those with a gifted/talented record, select **<Gifted/Talented>** from the **SEN Status** drop-down list then click the **Search** button. Select the required student from the subsequent list.*

- Click the **Gifted / Talented** hyperlink to display the **Gifted / Talented** panel.

9 Gifted / Talented

Is Gifted / Talented Start Date 05/09/2011 End Date

Gifts / Talents

Subject	Notes
Music	Talented Pianist

Provisions

Provision Type	Start Date	End Date	Cost	Frequency
Accelerated Learning	05/09/2011		45.00	One session p...

Events


Event Type	Date	Comments
------------	------	----------

- Select the **Is Gifted / Talented** check box to activate the **Start Date** field (defaults to today's date). A historic date can be entered, if required.
- Although not collected for the return, the following additional information can be recorded:
 - To add gifts and/or talents, click the **New** button adjacent to the **Gifts / Talents** table to display the **Add/Edit Gift/Talent** dialog.
Select the **Subject** in which the student excels from the drop-down list, add any applicable **Notes** then click the **OK** button to return to the **Gifted / Talented** panel.
 - To enter **Provisions** and/or relevant **Events**, click the appropriate **New** button then enter the required information.
- Click the **Save** button on the **Student SEN details** page to save any changes.

 **Completed**

Preparing Exclusions Information


Exclusions information is required for students who were subject to any exclusion with a start date during the period 01/01/2011 – 24/04/2011 inclusive. Exclusions should not be counted if the Head Teacher withdrew them, or if the student was re-instated by the Discipline Committee or an independent Appeal Panel.

 **NOTE:** To ensure that overturned exclusions are not included in the School Census, it is important that the Discipline Committee and Exclusion Appeal results are recorded in the **Appeal Details** panel (via **Focus | Student | Exclusions**).

The following data items are required for this School Census:

- Exclusion **Type** (category, e.g. fixed period, lunchtime or permanent)
 - Exclusion **Reason** (select one code to provide the main reason)
 - Exclusion **Start Date**
 - Actual number of sessions (required for fixed period and lunchtime exclusions).
-

 **NOTE:** The **Start Date**, **End Date** (if known) and **LA Details** must be entered for any type of exclusion recorded for any students in care.

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

- *In Care indicator (if applicable)*
 - *SEN Status (if applicable – note that **Never Assigned** is not an acceptable value for excluded students)*
 - *Ethnicity*
 - *Ethnic Source*
 - *Part-time indicator (if applicable)*
 - *Date of Admission.*
-

Recording an Exclusion

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

2. Search for then double-click the required student to display the **Exclusion Details** page.

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

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

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

Academic Year	Term	Start Date	End Date	Length	Exclusion Type	Exclusion Reason
Academic Year 2010/2011	Summer Term	21/06/2011	23/06/2011	3	Fixed Term	Verbal abuse/threatening behaviour a...

Total in Academic Year 2010/2011: 3 day(s)

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

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

For more information on exclusions, please refer to the following area of the DfE website:

<http://www.education.gov.uk/schools/pupilsupport/behaviour/exclusion>

 **Completed**

Preparing Attendance Information

Attendance data should be provided for non-boarder students aged 5 to 15 inclusive on 31/08/2010, who were on-roll for at least one session during the period from 25/04/2011 to 27/05/2011 inclusive.

The attendance data collected in this School Census return includes:

- Attendance Codes
- Number of Sessions Missed.

Attendance data is entered directly into the return, providing that there are no missing marks.



IMPORTANT NOTE: *Ensure that all missing marks and unexplained absences for the previous term have been dealt with before commencing the School Census Return.*

For more information about completing the School Census Autumn 2011 Return, please refer to the *Producing the School Census Autumn 2011 Return* handbook.

For information and advice about school attendance, please refer to the following area of the DfE website:

<http://www.education.gov.uk/schools/pupilsupport/behaviour/attendance>



More Information:

*Producing Detail Reports on page 15
Attendance in SIMS handbook
Lesson Monitor in SIMS handbook*

Completed

Checking/Correcting Hours at Setting Information

Applicable to schools with 2, 3 or 4 year old pupils only

Hours at Setting is the total number of LA funded and unfunded hours that a student spends at the Early Years setting, to the nearest 0.5 hour.

For the School Census Autumn 2011 Return, a student's age is determined by their age at 31/08/2011.

If applicable to your school, check the Hours at Setting for 2, 3 and 4 year olds via **Tools | Statutory Return Tools | Update Hours at Setting for 2 (or 3 or 4) year olds**.

For more information, please refer to the Primary version of this guide, which is available on our SupportNet website (<http://support.capitaes.co.uk>) by entering CENSUS11 in the **Site Search** field on the SupportNet Home page then clicking the **Go** button.

Completed

Preparing Post 16 Information in Course Manager

Applicable to Secondary schools with a Sixth Form only



NOTE: Post 16 Learning Aims data is collected from Secondary schools (including City Technology Colleges (CTCs) and Academies) with sixth forms only.

Information is required on the Learning Aims studied by students in Year 12 and above, regardless of their age, and by students in Year 11 or below who are studying towards a Level 3 qualification, e.g. GCE AS Level.

This information is collected for all relevant students who are registered at the school, and for all students who are no longer on-roll but were on-roll for at least one session between the current and previous census days. This might include students who have left school prior to the census day.

In preparation for the School Census Autumn 2011, Post 16 Learning Aims should be recorded (via **Tools | Academic Management | Course Manager | Maintain Course**) for the period 20/05/2011 to 06/10/2011.

Each student may have a number of Learning Aims. For each Learning Aim, six data items are collected:

- Qualification Accreditation Number (QAN)
- Learning Aim Start Date
- Learning Aim Planned End Date
- Learning Aim Actual End Date
- Learning Aim Completion Status
- Discount code.

It is important to ensure that the information entered in Course Manager is up-to-date and accurate before starting the return.

When creating the School Census Autumn 2011 Return, the new **Update Learning Aims** panel is provided to deal with the Post 16 information required for the return. Detailed information about the functionality provided in this panel is available in the *Producing the School Census Autumn 2011 Return (English Secondary and Middle deemed Secondary)* handbook.



IMPORTANT NOTE for Secondary schools with Sixth Form students: A document dedicated to the preparation of Post 16 information (*Preparing Post 16 Data for the School Census Autumn 2011 Return guide*) is available on our SupportNet website (<http://support.capitaes.co.uk>) by entering *CENSUS11* in the **Site Search** field on the SupportNet Home page then clicking the **Go** button.

Completed

Deleting Unwanted Student Records

If there are students who have been entered in error (such as duplicates), ensure that they are deleted so that they are not included in the return. This is achieved via **Routines | Student | Delete Student**. After selecting the required student, you have the chance to review and print their information before deleting their record permanently. (Please inform IMRS if you need to use this route)



IMPORTANT NOTE: The deletion is irreversible, therefore a student should be deleted only if they have been entered in error.

Completed

05 | What Next?

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

The SIMS 2011 Summer Release (7.140) must be installed before completing the School Census Autumn 2011 Return. However, it is advisable to check whether a later version of SIMS is available, then upgrade to the current release, if necessary.

You should now be ready to produce the final School Census Autumn 2011 Return. For specific instructions, please refer to the *Producing the School Census Autumn 2011 Return (English Secondary and Middle deemed Secondary)* handbook.

Where Can I Get More Information?

- In addition to this preparation guide a handbook outlining how to produce the School Census Autumn Return (via **Routines | Statutory Returns | School Census**), an Errors and Resolutions document (which provides suggestions on how to resolve any validation errors or queries) and an additional Preparation guide dealing specifically with Post 16 data are being prepared:
 - *Producing the School Census Autumn 2011 Return (English Secondary/Middle deemed Secondary Schools)* handbook
 - *School Census 2011 Errors and Resolutions* document
 - *Preparing Post 16 Data for the School Census Autumn 2011 Return* guide.

You may also find the information in the *Managing Pupil/Students in SIMS* handbook helpful, as it provides details about the processes that relate to the management of student data in SIMS.

These documents, together with other useful information, e.g. news items, are available on our SupportNet website (<http://support.capitaes.co.uk>). To locate the documents, enter CENSUS11 in the **Site Search** field on the SupportNet Home page then click the **Go** button. A list of all available supporting information will be displayed, from which the required resources can be selected. Please check SupportNet on a regular basis because documents will be posted as soon as they become available.

A wide range of documentation, including handbooks, mini guides, quick reference sheets, etc. can be accessed via the **Documentation Centre** by clicking the **Documentation** button located at the top of the SIMS **Home Page**. Once open, click the required category button then select the required document.

References to other documents mentioned in this handbook can be accessed via the **Documentation Centre** unless otherwise specified.

- There is a comprehensive online help system available in SIMS, accessed by clicking the applicable **Help** button or by pressing **F1** from anywhere in the software.
- The Service Desk provides a dedicated website that lists all the available documentation, together with all related solutions and any other useful resources. The website can be accessed at the following address:

<http://support.capitaes.co.uk/hottopics>

Once open, select the required topic from the list, e.g. **School Census – Autumn 2011**.

- The DfE website also contains preparation and guidance documentation and can be found at the following address:

<http://www.education.gov.uk/schools/adminandfinance/schooladmin/a0064400/school-census-2011>

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