Autumn 2017
School Census Guidance

All-Through Schools
If you have any queries on using your MIS (SIMS) system to complete your Census return, please contact the Capita helpdesk on 0844 8922406

(Calls to 0844/0845/0870 numbers will cost three pence per minute, plus your phone company’s access charge.)

If you have any queries relating to the DfE Guidance, please contact the Business Intelligence and Performance Improvement Team

on 01604 366190

or email

education@northamptonshire.gov.uk
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What’s new in this census/SIMS

New data items

(a) Disability Access Fund (Applicable to All-Through schools with a Nursery)

Tools | Statutory Return Tools | Update Early Years

This new option provides the ability to record whether three- and four-year-old pupils (not in Reception) are in receipt of the Disability Access Fund.

(b) Extended Funded Hours (Applicable to All-Through schools with a Nursery)

Tools | Statutory Return Tools | Update Early Years

This new option provides the ability to record the number of Extended Funded Hours that are in addition to the initial funded hours that the child receives. This is available for three and four year olds (not in Reception) with working parents.

(c) 30 Hour Code (Applicable to All-Through schools with a Nursery)

Tools | Statutory Return Tools | Update Early Years

This new option provides the ability to record the 11 digit 30 Hour Code for three and four-year-old pupils. This code confirms the eligibility of working parents to access the additional 15 hours of extended childcare.

(d) Establishment Unique Reference Number

Focus | School | School Details

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

(e) Hours and Minutes Format (Applicable to All-Through schools with a Nursery)

Tools | Statutory Return Tools | Update Early Years

Values for Funded Hours, Hours at Setting and Extended Funded Hours can now be entered in hours and minutes using two decimal places, e.g. 1 hour 15 minutes should be entered as 1.25 and 3 hours 40 minutes should be entered as 3.67.

(f) 2-year old basis for funding (Spring return only and applicable to All-Through schools with a Nursery)

Tools | Statutory Return Tools | Update Early Years

This new data item records the basis on which 2 year olds have been funded whilst taking up a place in the school. This data item is not required for 3 and 4-year-olds. 2-year-old children may meet more than one criterion in the table shown below and each relevant criterion is returned in the census.

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ECO</td>
<td>Economic criteria</td>
</tr>
<tr>
<td>HSD</td>
<td>High-level SEN or disability</td>
</tr>
<tr>
<td>LAA</td>
<td>Looked after or adopted from care</td>
</tr>
</tbody>
</table>
Amendments to data items already collected

(a) Special Educational Needs
The following new items are collected for all three School Census Returns, previously only collected in the spring census return and displayed in the SEN Detail report:

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

(b) Proficiency in English (Spring return only)
This is collected only where the pupil's language code indicates that the pupil's first language is not English. This is now only to be collected in the spring census return.

Copying a Return File

Routines | Statutory Returns | School Census - Copy
The message displayed when the Copy button is clicked has been modified for clarity. The message now reads:

Any values for Attendance, Hours for Early Years, Adopted from Care and Top-up Funding WILL NOT BE COPIED but will be populated from the current values held in the database.

Create & Validate must be run in order to generate a new census file.

Do you want to make a copy of the return "<return name>"?

Deadlines

THE DEADLINE FOR AUTUMN CENSUS RETURNS TO NORTHAMPTONSHIRE COUNTY COUNCIL VIA AVCO IS Friday 6th October 2017.

Introduction

Every school is expected to complete three Census Returns in the academic year 2017/2018.

The Census Dates for 2017/2018 are:

• (Autumn)       first Thursday in October  (5th October 2017)
• (Spring)        third Thursday in January (18th January 2018)
• (Summer)       third Thursday in May     (17th May 2018)
The table below gives a summary of which data areas will be collected in each census.

<table>
<thead>
<tr>
<th>Module</th>
<th>Autumn Census</th>
<th>Spring Census</th>
<th>Summer Census</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pupil ID</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pupil Characteristics</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Pupil Status</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>SEN</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>FSM eligibility</td>
<td>19/05/17 – 05/10/17</td>
<td>06/10/17 – 18/01/18</td>
<td>19/01/18 -17/05/18</td>
</tr>
<tr>
<td>Home Information</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Attendance (for pupils aged 4+ on 31st August)</td>
<td>For Terms 5 + 6 (Summer 2017)</td>
<td>For Terms 1 + 2 (Autumn 2018)</td>
<td>For Terms 3 + 4 (Spring 2018)</td>
</tr>
<tr>
<td>School Characteristics</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Admission Appeals</td>
<td></td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Class Information</td>
<td></td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Pupil Reconciliation</td>
<td></td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Miscellaneous</td>
<td></td>
<td></td>
<td>✓</td>
</tr>
</tbody>
</table>

This document is designed to help you through the processes required to complete your Autumn Census 2017 return using SIMS. The notes are designed to be used in conjunction with the 2017/2018 DfE Guidance notes which can be downloaded from:


Important note for Academies

Guidance on the data returns due from academies can be accessed via the following DfE website link:


ALL SCHOOLS INCLUDING ACADEMIES

*Academies should upload their Census file directly onto the Secure Access website but it is requested that AnyComms is then run so that the Census files can also be sent to the LA.*

REMEMBER TO SEND A COPY OF YOUR CENSUS FILE TO NORTHAMPTONSHIRE COUNTY COUNCIL VIA AnyComms – see page 59. The reasons for this request are outlined in the Data Exchange Agreement signed by each Academy.
Data Checklist – Autumn Census 2017

<table>
<thead>
<tr>
<th>Tasks to be completed prior to Census day</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ensure Summer Census has been authorised</td>
</tr>
<tr>
<td>The School Census Summer 2017 Return must be completed and accepted by Northamptonshire County Council or DfE COLLECT (for Academies) before upgrading to the SIMS 2017 Summer Release (7.176).</td>
</tr>
<tr>
<td>When the SIMS 2017 Summer Release is applied, the functionality to run the Summer 2017 School Census return is removed.</td>
</tr>
<tr>
<td>Upgrade to the SIMS 2017 Summer Release</td>
</tr>
<tr>
<td>Upgrade to a minimum of SIMS 2017 Summer Release 7.176. To check which version you are using, open SIMS and go to Help</td>
</tr>
<tr>
<td>Check that the latest Fileset has been imported</td>
</tr>
<tr>
<td>Check the Capita ESS website to see which, if any, fileset is available. Check Routines</td>
</tr>
<tr>
<td>Check School Details</td>
</tr>
<tr>
<td>Ensure that school details have been kept up to date. Ensure School URN is included – New requirement. See page 10 for further help.</td>
</tr>
<tr>
<td>Check Attendance</td>
</tr>
<tr>
<td>Attendance is collected Terms 5 &amp; 6 of the previous school year. Please ensure that you deal with all missing marks and unexplained absences. See page 83 for further help.</td>
</tr>
<tr>
<td>Update Prior Attainment. Applicable to All-Through schools with Post 16 students.</td>
</tr>
<tr>
<td>Check prior attainment for Maths and English is correct and update if necessary. Go to Tools</td>
</tr>
<tr>
<td>Update Class Type</td>
</tr>
<tr>
<td>Check class type is correct and update if necessary. Go to Tools</td>
</tr>
<tr>
<td>Update Hours for Early Years. Note: change to collection requirements – See page 14.</td>
</tr>
<tr>
<td>Check Hours at Setting and Funded Hours are correct and update if necessary. Add any extended hours, 30-hour codes and disability funding. Go to Tools</td>
</tr>
<tr>
<td>Update Top up Funding</td>
</tr>
<tr>
<td>Ensure that you have listed all those students who are receiving Top-up Funding. Go to Tools</td>
</tr>
<tr>
<td>Update Post Looked After Arrangements</td>
</tr>
<tr>
<td>Ensure that all students where you have been notified as being adopted from care are recorded correctly. Go to Tools</td>
</tr>
</tbody>
</table>
### Tasks to be completed prior to Census day

<table>
<thead>
<tr>
<th>Task</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Check Learning Aims.</strong> Applicable to All-Through schools with Post 16 students.</td>
<td>Ensure that the QN, discount code, learning aim start date, planned end and actual end dates, Core Learning aim, Partner UKPRN, Traineeships and withdrawal reasons have been logged correctly. See Post 16 Census Requirements booklet for further help.</td>
</tr>
<tr>
<td><strong>Create a Dry Run</strong></td>
<td>Complete a dry run and solve any errors. See page 28 for further help.</td>
</tr>
<tr>
<td><strong>Run Detailed Reports</strong></td>
<td>Print out detailed reports for appointed staff to check and agree. See page 32 for further help on detailed reports.</td>
</tr>
<tr>
<td><strong>Check Free School Meal Eligibility Against the FSM report</strong></td>
<td>Check students eligible for FSM on Census day. Also check that those whose eligibility has stopped have an End Date. See page 62 for further help on adding or amending FSM data.</td>
</tr>
<tr>
<td><strong>Check Exclusions against the Exclusions report</strong></td>
<td>Details will be collected of all permanent and fixed term exclusions for Terms 3 &amp; 4 of the last academic year (01/01/17 – 16/04/17). See page 65 for further help on adding or amending exclusions.</td>
</tr>
<tr>
<td><strong>Check NC Year Actual against the Basic Details report</strong></td>
<td>Double check that those students who are taught out of year are correctly recorded in Student Details</td>
</tr>
<tr>
<td><strong>Check Enrolment status against the Basic Details report</strong></td>
<td>Make sure that all students attending your school and another (For example: Managed Moves; Special; PRUs; Hospital Schools) have the correct Enrolment Status in the Basic Details report. See page 73 for further help on amending this data.</td>
</tr>
<tr>
<td><strong>Check Leavers and Re-Admissions against the Leavers Report</strong></td>
<td>Check that all your leavers are taken off-roll and any returning students have been re-admitted. See page 68 for further help in amending this data.</td>
</tr>
<tr>
<td>Task</td>
<td>Details</td>
</tr>
<tr>
<td>----------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Enter School Dinners Taken details</td>
<td>Reception, Years 1 &amp; 2 only</td>
</tr>
<tr>
<td>Create and Validate Census Return</td>
<td>See page 45 for further help.</td>
</tr>
<tr>
<td>Run Detailed Reports</td>
<td>Print out detailed reports for appointed staff to check and agree.</td>
</tr>
<tr>
<td>Check the Summary Report</td>
<td>Print out and check the summary report and ask the Head Teacher (or</td>
</tr>
<tr>
<td></td>
<td>equivalent) to check and agree it. For further help see page 57.</td>
</tr>
<tr>
<td>Authorise the Autumn Census return</td>
<td>See page 57 for further help.</td>
</tr>
<tr>
<td>Upload census file to Collect</td>
<td>Academies only</td>
</tr>
<tr>
<td></td>
<td>Academies should upload their census to Collect prior to completing the</td>
</tr>
<tr>
<td></td>
<td>final task. See page 59 for further help.</td>
</tr>
<tr>
<td>Upload census file to AnyComms (AVCO)</td>
<td>See page 59 for further help.</td>
</tr>
</tbody>
</table>
**SIMS version**

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

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

The version should read 7.176 or later.

**Importing Revised Filesets for Validation and Reports**

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

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

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

To use the Import Fileset functionality you must be a member of one of the following user groups in System Manager:

- Personnel Officer
- Returns Manager
- System Manager.

**IMPORTANT NOTE:** The report files are not always updated between releases. Therefore, it is not always necessary to use the Import Fileset routine. A news feed will be posted on [www.capitaess.co.uk](http://www.capitaess.co.uk) website if updated files are available for import.
If revised files are supplied, the fileset will be available as a .ZIP file, which should be downloaded, unzipped, and 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 | School Census to display the Census Return browser. The Validation Fileset ID is displayed in the header of the browser.

### Importing the Revised Filesets

1. If revised filesets are supplied, download the required ZIP file from www.capitaess.co.uk website to a folder of your choice.
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 downloaded fileset. The file name is made up of the following data fields: <Fileset Number>-<Census Name>-<Term and Year>_Fileset.mfs.
6. 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 the fileset description (**Title**).

7. Click the **Import Fileset** button to import the fileset. When the import process is finished, **Import successful** is displayed at the bottom of the **Fileset** panel.

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```
8. Click the **OK** button, close SIMS then re-open to ensure that the new file takes effect.

9. Run the return in the usual way

```
Checking School Level Information

Checking Establishment Details

The following establishment details are required for the School Census Autumn 2017 Return and therefore need to be checked to ensure that they are correctly recorded in SIMS:

- School Type
- School Governance
- Intake Type.

The following read-only items are also collected for the School Census Autumn 2017 Return. Please contact your Local Support Unit if the information displayed is incorrect.

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

The panel below is taken from the Census screen showing the information collected in each census return.

![School Information Table]

New data item for Autumn 2017

The school’s Unique Reference Number is being collected. Whilst this is not collected from SIMS, but from Edubase which schools should check and update via the Secure Access website, it is worthwhile adding the number to the SIMS school details panel as outlined below.

The school’s URN can be found by going to the Edubase website:
http://www.education.gov.uk/edubase/home.xhtml

Please note: Edubase is soon to be superseded by a new government site called “Get Information about Schools”. This site is not yet live and it is not yet known when it will become live. In the meantime, please continue to use Edubase as the resource for finding URNs.
On accessing the site, enter your Establishment Name and click Search establishment.
If more than one option appears, choose the appropriate one.
A screen will open showing many details about the school. The URN is at the top of the screen.

To check/amend the school information is correct:
1. Select Focus | School | School Details to display the School Details page.
2. Check that the details displayed in the 1 Establishment panel are correct.
3. Ensure that the School Type, School Governance and Intake Type are displayed correctly. Select as required from the drop-down lists.
4. Add or amend the school’s URN as necessary.
5. If you have edited the Establishment panel, click the Save button.

Checking Telephone and Email Information

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

- School Email Address
- School Telephone Number (including STD code)

1. Select Focus | School | School Details to display the School Details page.
2. Click the Contact Details hyperlink to display the Contact Details panel.
3. Ensure that a Telephone number has been recorded (including the STD code).
4. Ensure that the school's official communications **Email** address has been recorded correctly (it must include the @ character together with a minimum of one full stop).

5. Click on the **save** button if you have made any amendments.

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

**Information for Academies:**

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

- The **School Type** and **School Governance**. Select **Academies** from the drop-down lists.
- The school's **Previous Name** and **Date Name Changed**.
- The **Previous Estab Number** and **Date Number Changed**.
- The **Previous URN Number** and **Date Number Changed** (if applicable).

The establishment number information is used by School Census. If the DfE number has changed for sponsor-led Academies, the date the number changed is interpreted as the date the academy opened and historical information from before this date is not collected.
**Updating Class Types**

All-through schools must specify the type of class (Nursery or Other) that each pupil belongs to on census day. Pupils in your Nursery class should be specified as Nursery, with all other pupils specified as Other.

1. Click on Tools | Statutory Return Tools | Update Class Type (the data will be displayed automatically in the Class Type panel in the census return).
2. A message informing you that class type data has been brought forward from the previous census may be displayed. Click the OK button to display the Update Class Type page.

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

To specify the class type for an individual pupil, click the associated Nursery or Other cell to enter a tick. To change your selection, click in a different cell or click again in the current cell to remove the tick.

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

3. Right-click the Other column header then select Check All.
4. In the View Pupils panel, select Year N2 from the Year Group drop-down list. Year N2 pupils only are displayed in the Pupils panel.
5. Right-click the Nursery column then select Check All.
6. Repeat steps 4 and 5 for any additional Nursery classes.
7. To check your selections, select All from the Year Group drop-down list.
8. Click the Save button.
If a message is displayed advising that some pupils have not been assigned a class type, click the **Yes** button then ensure that a class type is allocated to all pupils before saving again.

**Resetting All Class Types**

1. On the **Update Class Type** page, right-click in the **Nursery** or **Other** column header, as required, then select **Remove All** from the drop-down list. The **Nursery** or **Other** column is cleared of all ticks.
2. Re-enter the correct class types as described previously.

**Identifying which Pupils have no Class Type Specified**

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

**Update Hours for Early Years**

**Early Years**

Each term the school claims on behalf of the parents for the number of sessions their pupils will be attending. The LA then pays the funding directly to the school. During census week the Department for Education (DfE) requires detailed information about provision to under-fives, which is funded by the LA under the statutory guidance for free entitlement to education for under-fives. This is in order to ensure that the dedicated schools grant is properly allocated. Information is required for each pupil aged two, three and four (as at 31st August), on the number of hours spent in education provision at the school.

In addition to this the DfE also requires schools to record the total number of hours that pupils spend in education provision at the school, irrespective of who funds the hours (the total hours funded under the free entitlement to nursery education plus any additional hours of education funded from other sources such as parents).

The age for the hours spent at the setting is determined by the pupils’ age on 31st August preceding the census that is 31/08/2017 for the 2017 - 18 autumn, spring and summer census.

All two, three and four year old pupils funded through the funded hour’s entitlement are eligible for a minimum of 15 funded hours a week.

Data is returned for all 2, 3 and 4 year olds.

For the 2017-18 census data is collected as follows:

**Funded Hours and Hours at Setting**

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

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

The hours collected in this return are for the week in which the census day falls.
### Autumn School Census 2017: Guidance Notes for All-Through Schools

<table>
<thead>
<tr>
<th>Census</th>
<th>Phase &amp; year group</th>
<th>Date of birth ranges</th>
<th>Free entitlement to funded hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>Autumn, Spring and Summer</td>
<td>All relevant schools and year groups</td>
<td>01/09/2013 to 31/08/2015 inclusive</td>
<td>15 hours</td>
</tr>
<tr>
<td></td>
<td>All schools (excluding Nursery Schools) – National Curriculum year groups E1, E2, N1 and N2 only. For Nursery schools – All year groups. NB No longer applies to Reception (Year R)</td>
<td>01/09/2012 to 31/08/2013 inclusive</td>
<td>15 hours</td>
</tr>
</tbody>
</table>

### Disability Access Fund

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

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

and

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

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

### Extended Funded Hours and 30 Hour Code

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

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

Both parents must be working (or the sole parent is working in a lone parent family) and live in England.
Each parent earns, on average, a weekly minimum equivalent to 16 hours at National Minimum Wage or National Living Wage.

Each parent must have an annual income of less than the specified amount.

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

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

<table>
<thead>
<tr>
<th>Census</th>
<th>Phase &amp; year group</th>
<th>Date of birth ranges</th>
<th>Free entitlement to funded hours</th>
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</tbody>
</table>

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

NOTE: Pupils aged 4 at the start of the academic year in reception and above are funded as full time equivalent pupils via the schools block of the dedicated schools grant and therefore funded hours are not relevant for those pupils as they are not funded via the free entitlement.

For dual registered pupils, record the funded hours spent in education at each school. The main registration records funded hours in education at the main registration, with the subsidiary recording funded hours in education at the subsidiary registration.

1. Select Tools | Statutory Return Tools | Update Hours for Early Years

If available, the hours data is brought forward from the previous census. This data should be reviewed and updated, if required.

NOTE: If your school does not use the Define Early Years Attendance Patterns functionality, the data can be entered in the grid manually.
2. Update all pupils to ensure that they have an appropriate entry for **Hours at Setting** and **Funded Hours**.

3. For those pupils who are in receipt of **extended funded hours**, the **30 hour code** should be added as well as the **number of extended funded hours** to a maximum of 15.

4. The **Disability Access Fund** indicator also needs to be updated. Each three or four year old must have either **Yes** or **No** indicated. It is not necessary to complete this column for 2 year olds but if you do, the data will be ignored.

5. **Right click** on the **Disability Access Fund** column header

6. Choose **Select All**

7. Click in one cell and choose **No** from the drop down list. The whole column will flood fill with **No**.

8. Remove the highlighting by clicking to the right of the grid to deselect all and then individually change **No** to **Yes** for those in receipt of the Access fund.

9. Click **Save** and then close the panel.

**IMPORTANT NOTE:** Values for **Funded Hours**, **Hours at Setting** and **Extended Funded Hours** can now be entered in hours and minutes using two decimal places, e.g. 1 hour 15 minutes should be entered as 1.25 and 3 hours 40 minutes should be entered as 3.67.

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

1. Select the required year group from the **Year Taught In** drop-down list. The selected pupils only are displayed in the **Pupils** panel.
2. **Right-click** in the **Pupils** panel then choose **Select All** from the drop-down list.
3. Click in one of the highlighted cells of the column you wish to populate, i.e. **Hours at Setting** (or **Funded Hours**), then enter the number of hours that is applicable to the majority of pupils.

The number is entered automatically for all selected pupils.
4. Click to the right of the grid to deselect all.

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

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

### Updating Students with Top-Up Funding

The school needs to indicate those students, if any, on roll at census day for whom the school receives top-up funding from the Local Authority. Top-up funding is supplied by Local Authorities from their high needs budget directly.

1. To indicate which students receive top-up funding select **Tools | Statutory Return Tools | Update Top-Up Funding**

2. You may be asked if you wish to copy forward the pupils from Summer. Click **Yes**. Any students currently recorded as having top-up funding are displayed in the **Top-up Funding** table.

3. Use the **search** criteria to locate any additional students you wish to record as having top-up funding then **highlight** their details.

4. Click **Search**.
5. Click the **Add** button. The highlighted students are displayed in the **Top-up Funding** table.
6. To remove a student from the list, **highlight** the required student then click the **Remove** button. The student’s record is displayed in the first table, providing a chance to reselect the student, if required.

7. Click the **Update** button to save the data and arrange the list of students in **Surname** order.
Updating Students Post Looked After Arrangements

This data item will identify those students on roll on census day who were looked after immediately before adoption, being placed on a special guardianship or residence order. It is up to the adult that has parental responsibility for those students to decide if they wish schools to know this information.

1. Select Tools | Statutory Return Tools | Update Post Looked After Arrangements to display the Update Students Post Looked After Arrangements page. Any students currently recorded as ceased to be looked after are displayed in the Post Looked After Arrangements table.

   ![Update Students Post Looked After Arrangements](image)

2. Use the search criteria to locate the additional students you wish to record as ceased to be looked after then highlight their details.
3. Click the **Add** button. The highlighted students are displayed in the **Post Looked After Arrangements** table.

4. Ensure that the post looked after arrangements status is displayed for all the students by clicking the **PLAA** cell then selecting the applicable status from the drop-down list:
   - **Ceased to be looked after through Adoption**
   - **Ceased to be looked after through a Special Guardianship Order (SGO)**
   - **Ceased to be looked after through a Residence Order (RO)**
   - **Ceased to be looked after through a Child Arrangement Order (CAO)**

5. If you tick the box to say that evidence has been obtained, then you will be warned to ensure that the evidence is kept securely. Click **OK**.
6. To remove a student from the list, highlight the required student then click the **Remove** button. The student's record is displayed in the first table, providing a chance to reselect the student, if required.

7. Click the **Update** button to save the data and arrange the list of students in **Surname** order.
Updating Information Using the Bulk Update Routine

Before beginning the School Census return, ensure that all current students are recorded 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.
- any duplicate or unwanted student records have been deleted.
- part-time details have been checked/updated.

NOTE: Ensure that a student’s first language, nationality, country of birth, proficiency in English and boarder status are entered before they are recorded as a leaver.

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 the Bulk Update routine. When you have upgraded to the SIMS 2017 Summer Release (SIMS 7.176), 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.

Using the Bulk Update Routine

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

Many items can be checked using the Bulk Update routine. This functionality enables you to search for missing or invalid data and then update in bulk.

For example, it is possible to search for all students who do not have a Nationality 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** browser.
2. In the **Bulk Update** panel, select the required **Group Type** and **Group** from the drop-down lists. (See table below)

   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 7**.

   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:

<table>
<thead>
<tr>
<th>Group Type</th>
<th>Group</th>
<th>Data Item</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Language</td>
<td>&lt;NONE&gt;</td>
<td>First Language</td>
<td>Identifies students who do not have a First Language recorded. Can also be used to change existing values as required.</td>
</tr>
<tr>
<td>SEN Status</td>
<td>EHCP</td>
<td>SEN Provision Type</td>
<td>Lists students with a SEN Status of E enabling the SEN Provision to be selected.</td>
</tr>
<tr>
<td>SEN Status</td>
<td>SEN Support</td>
<td>SEN Provision Type</td>
<td>Lists students with a SEN Status of K enabling the SEN Provision to be selected.</td>
</tr>
</tbody>
</table>

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

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

5. 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 **Pupil Nationality** types.

**TIPS:** Use the horizontal and vertical scroll bars to view additional columns or rows as required. To increase the number of columns visible on the page, right-click any column heading then select Narrow Columns from the pop-up menu.
Bulk Updating Data with the Same Data 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, the ethnic range within your school).

The following example illustrates how to set all the students as English for their First Language then edit the exceptions.

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

   All the cells within that column are populated with ticks.

2. Edit the exceptions by clicking in the cell associated with the individual student and their status.

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

Bulk Updating Data for a Selection of Students

There are two methods for selecting a number of students.

Entering Values for a Selection of Students

1. Highlight the first student you wish to select then hold down the Ctrl key and highlight the other required students.

2. Release the Ctrl key, then click one of the highlighted cells in the required data item column.

   A tick indicates that the student has been assigned that value.
Entering Values for Sequentially Listed Students

This method can be used for assigning a value to a group of students. For example, to assign English to all unassigned students, click the Assigned column heading to display all unassigned students at the top of the list.

1. **Highlight** the first student in the group, hold down the Shift key then click the last student in the group (alternatively, hold down the Shift key and press the Down Arrow key).
2. Release the Shift key then click one of the highlighted cells in the required data item column.
   A tick indicates that the student has been assigned that value.
DRY RUNS

When the SIMS 2017 Summer Release (SIMS 7.176) has been installed, you can carry out one or more dry runs.

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 processes mentioned previously in this guidance.

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 purpose of producing a dry run. For the main return the School Census Folder should be set as n:simssstarlascout where n: is the drive letter of your sims directory (usually c: or s:).

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

Consider which users have access to the chosen folder, especially if the folder is shared on a server. The DfE recommends ISO27001 as the standard for information security (http://www.itgovernance.co.uk/iso27001.aspx). If you are in any doubt, you should consult with your IT Security Officer before proceeding.
3. Click the **New** button to display the **Census Return Details** page.

![Census Return Details](image)

By default, the return **Description** is displayed as **School Census Autumn 2017**.

4. Click the **Calculate All Details** button on panel 1 to extract the required information from the SIMS database and display the results in the various panels of the **Census Return Details** page.

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.

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

**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.

![Validation Errors Summary](image)

The **Validation Errors Summary** panel header displays the number of errors and queries found during the **Create and Validate** process.
Details about the errors and queries that have been found are displayed in the following columns.

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

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.

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.

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 and click the **Find** button.
Click a **Solution** hyperlink to display the area of SIMS where the associated issue can be checked/corrected. When you return to the **Validation Errors Summary** panel, the details of the applicable student are displayed in the **Student Search** field, the corrected error will not be removed from the list until you next Create and Validate.

Use the **Errors 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.

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.

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 validation failures (particularly useful if there are a large number of errors/queries) by clicking the **Report** button, which is located above the **Validation Errors Summary** panel. The report 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.

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

### Producing Detail Reports

Detail reports can be used to check the data stored in SIMS that has been used to create the return. The reports can be produced as soon as the return has been 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** that are listed in the report.

Also shown at the top of the report is the **School Name**, the **Fileset Number**, the **Filename**, the **Report Created** date, and the **XML Version**.

The following reports are currently available, with amendments to last Autumn's reports in italics:

#### On-Roll Basic Details Report

**Report Criteria**: Students on-roll on census day.

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

#### Leavers Basic Details Report

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

- Leavers with attendance 1 term ago (17/04/2017 to 31/07/2017)
- Leavers with exclusions 2 terms ago (01/01/2017 - 16/04/2017)
- Leavers with Learning Aims from 01/08/2017 – 05/10/2017

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

#### Exclusions Report

**Report Criteria**: On-roll pupil/students and leavers with exclusions two terms ago (01/01/2017 to 16/04/2017). Not applicable to pupil/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 pupil/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 First half of Summer Term Report**

**Report Criteria:** Pupil/students with attendance from 17/04/2017 to 28/05/2017. On-roll pupil/students and leavers (but not boarders) who were aged four to 15 at 31/08/2016.

This report displays the following information about pupil/students and their attendance during the first half of the Summer 2017 term: UPN, legal surname, legal forename, date-of-birth (DOB), gender, year taught in (YTI), number of termly sessions possible, number of termly absence sessions, on-roll status, termly attendance codes (authorised sessions and unauthorised sessions) and the number of sessions where attendance was not required.

Totals are displayed at the bottom of the applicable columns.

Code descriptions are displayed at the bottom of the report.

**Attendance Second half of Summer Term Report**

**Report Criteria:** Pupil/students with attendance one term ago (29/05/2017 to 31/07/2017). On-roll and leavers (but not boarders) who were aged four to 15 at 31/08/2016.

This report displays the following information about pupil/students and their attendance during the second half of the Summer 2017 term: UPN, legal surname, legal forename, date-of-birth (DOB), gender, year taught in (YTI), number of termly sessions possible, number of termly absence sessions, on-roll status, termly attendance codes (authorised sessions and unauthorised sessions) and the number of sessions where attendance was not required.

Totals are displayed at the bottom of the applicable columns.

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

**Absentees Report**

**Report Criteria:** Pupil/students who have missed 14 sessions and whose absence might need to be tracked. On-roll pupil/students and leavers (not boarders) with attendance one term ago (17/04/2017 to 28/05/2017) who were aged four to 15 at 31/08/2016.

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

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

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

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

This report provides a list of pupil/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, on-roll status, member of SEN unit and member of resourced provision indicator.

**Address Details Report**

Report Criteria: Students on-roll on census day.

This report provides a list of pupil/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) – a unique identifier (reference number) that links together related address records across different software programs. This enables organizations to collate and share information based on a common reference number.

**School Dinner Taken Report**

Report Criteria: On-roll pupils on census day, who have taken school dinner on the reference date. Pupils in Year Taught In R, 1 and 2.

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

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

**Free School Meal Eligibility Report**

Report Criteria: On-roll pupil/students on census day who were eligible for free school meals on or after 19/05/2017 and up to and including census day.

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

**NOTES:** This report includes any free school meals recorded outside of England, e.g. Wales. Only Free School Meals records where the Country recorded is England or <blank> attract the Pupil Premium.
**On Roll Learning Aims Report**

**Report Criteria:** On-roll pupil/students in Year 12 or above with Learning Aims during 01/08/2016 to 05/10/2017 (census day) who have an enrolment status of C (Current - Single Registration) or M (Current Main - Dual Registration).

This report provides the following information:

- basic details about the pupil/students who match the report criteria: UPN, legal surname, legal forename, year taught in, date of birth (DOB), date of admission (DOA) and enrolment status.

- Learning Aims information is displayed on the right-hand side of the report: QAN numbers, discount code, course description, course start date, end date, planned end date, actual end date, completion status, withdrawal reason, UK provider reference number (UKPRN), traineeship and indication whether the Learning Aim is the core aim (Yes/No).

**Definitions:**

- Learning Aim Planned End Date: The date by which the school and learner plan to complete the activities related to this learning aim.

- Learning Aim Actual End Date: The date that the learner completed the learning activities necessary to achieve the learning aim or the date the learner withdrew from the learning activities.

- UK provider reference number (UKPRN) - a unique identifier allocated to institutions by the UK Register of Learning Providers.

- Traineeship - a course with work experience that gets the pupil/student ready for an apprenticeship or work. A traineeship includes a work experience placement and help with English and maths, if required.

**Leavers Learning Aims Report**

**Report Criteria:** Leavers in Year 12 or above with Learning Aims during 01/08/2016 to 05/10/2017 who had an enrolment status of C (Current - Single Registration) or M (Current Main - Dual Registration).

This report provides the following information:

- basic details about the pupil/students who match the report criteria: UPN, legal surname, legal forename, year taught in, post code, date of birth (DOB), date of admission (DOA), date of leaving (DOL).

- Learning Aims information is displayed on the right-hand side of the report: QAN numbers, discount code, course descriptions, course start date, planned end date, actual end date, completion status, withdrawal reason, UK provider reference number (UKPRN), traineeship and indication whether the Learning Aim is the core aim (Yes/No).
**Learning Aims by Status Report**

**Report Criteria:** Learning Aims from 01/08/2016 to 05/10/2017 (including both on-roll and leavers).

**NOTE:** Large discrepancies between last year's and this year's data might indicate mistakes.

The report provides the following information:
- Each Learning Aim code and title.
- The total number of each Learning Aims in use for academic year 2016/2017 and 2017/2018.
- The number of each Learning Aim completed, continuing, withdrawn and transferred in the academic year 2016/2017 and 2017/2018.

**NOTE:** A learning aim may appear more than once in this table: for example, a continuing learning aim which began last year will be counted as continuing in both years.

**Programmes of Study Report**

**Report Criteria:** Pupil/students reported with Learning Aims in the School Census Autumn 2017 Return.

The report provides information about Planned Qualification Hours and Planned Non-Qualification Hours in 2017/2018.

Also displayed are the pupil/student's UPN, legal surname, legal forename, year taught in, full-time employed status and on-roll status.

**Definition:** Full-time employed pupil/students are those working eight or more weeks consecutively and for 20 or more hours per week. Part-time work (e.g. a weekend or evening work) is not included in the full-time employed hours.

**Prior Attainment Report**

**Report Criteria:** On-roll and leavers in YTI 12+ with Learning Aims in the School Census Autumn 2017 (01/08/2016 to 05/10/2017).

This report provides the following information: UPN, legal surname, legal forename, year taught in (YTI), enrolment status, Maths information (i.e. highest grade, prior attainment, and funding exemption), English information (i.e. highest grade, prior attainment, and funding exemption) and on-roll status.

**IMPORTANT NOTE:** Due to the range of qualifications that might be included in Prior Attainment and the variety of sources from which they might come (external results, internal results, non-edi results, marksheet entry, etc.), the report outputs must be carefully checked and amended where necessary via Tools | Statutory Return Tools | Update Prior Attainment.
Top-up Funding Report

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

The following information is displayed on the report: UPN, legal surname, legal forename, date of birth, gender, year taught in and SEN provision.

Early Years Report

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

- All 2 year olds born between 01/09/2014 and 31/08/2015 (Hours at setting and Funded Hours only)
- All 3 year olds born between 01/09/2013 and 31/08/2014
- All 4 year olds born between 01/09/2012 and 31/08/2013 with Year Taught In E1, E2, N1 or N2.

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

Post Looked After Arrangements Report

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

The report provides the following information about pupil/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).

It is strongly recommended that you print each report and check the data for accuracy.

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 and displayed in your web browser.
The following example displays the reports available for schools.

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 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.

Creating the Final Return
If you have not created a dry run for this census return, please follow the steps on page 28.
1. If the census file is not already open, click on Routines | Statutory Returns | School Census

You will see the following message

2. Open the census return you have used previously for dry run(s) or click on New to create a new School Census return.
You can create as many trial runs as you like. It is possible to delete unwanted returns before authorisation. You will only Authorise and submit one return once all the data is correct and all the validation errors have been cleared.

Panel 1 Census Details

The defaults for your phase of school will be displayed. The Census Date should be 05/10/2017. You can add a different Description if required.

Calculating the School Census Return

Only applicable if you are starting a new Census return

1. Click on the Calculate All Details button at the top of panel 1 Census Details.

You will then see the following message:

Please check the warning carefully and choose Yes or No as appropriate.

2. When you are ready to calculate, click the Yes button to calculate all details. At this point, depending on the number of pupil/students in the school, there may be a short delay while details are calculated.
When the Calculate All Details process is complete, the **Source for Learning Aims Planned End Date** dialog is displayed.

3. Specify the required source for the Learning Aims data:
   - **Populate planned end dates from previous returns** (default option)
     Ensure that the **Populate planned end dates from previous returns** radio button is selected then highlight the required authorised Autumn Census Return. (If more than one authorised School Census Autumn 2017 Return exists, the returns are listed in authorised date order.) This would be the option for most schools.
   - **Populate planned end dates from course manager**
     An example of when this option could be useful is:
     If any two year Learning Aims were inadvertently given an end date last year that indicated a one year Learning Aim, selecting **Populate planned end dates from course manager** could save your school some time.

     This is only acceptable when correcting a mistake and not where it has been decided to change the length of time in which to deliver the Learning Aim.

     Select the **Populate planned end dates from course manager** radio button, if this is appropriate for your school.

4. If you want to **Use Exam Result to determine QN/Discount code**, ensure that the associated check box is selected.
   If QN/Discount Code combinations from one or more Exam Boards do not follow the expected pattern and therefore cause incorrect allocation of QWS QN/Discount Codes, it may be best to deselected **Use Exam Result to determine QN/Discount code**.
If the check box is deselected, the QWS QN code in Course Manager is reported rather than the Awarding Organisation (AO) QN linked to the exam result.

5. Click the OK button.

**NOTE:** If you choose to Cancel at this point in the process, Learning Aims Planned End Dates will be calculated from Course Manager.

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

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

7. **Panel 2 School Information**

If the School Details have not been updated by selecting Focus | School | School Details, the School Details button at the bottom of the School Information panel will access that area enabling the required information to be entered.

The basic School Information will be displayed. Most of the fields on this panel must be completed. If anything is missing or incorrect at this stage you can make any changes/additions before proceeding. You must make sure that a School e-mail Address is entered as this is a compulsory field for School Census. The e-mail address should be one to which the headteacher has regular access.

![School Information Panel]

**INFORMATION FOR ACADEMIES**

Select Academies from the School Type and School Governance drop down lists. Academies should ensure that the Previous School Name and the Date Name Changed are entered if applicable. If the name did not change when the school converted to Academy status, enter the school's current name in the previous name field.
If the Establishment number and URN Number has changed, please also complete the Previous Estab Number and Date Number Changed, Previous URN Number and Date Number Changed.

After you have finished making changes to the school details click on Save to save the changes and click OK to return to your School Census return.

**Panel 3 Hours for Early Years**

Initially the screen will show the hours that you have input by selecting Tools | Statutory Return Tools | Update Hours for Early Years

If you need to update this information, click on the Edit button then OK button. You will now be able to edit/update the Hours for Early Years. Please see page 14 for further information. Amend and Save the amended data as necessary.

**Panel 4 Class Type**

Initially the screen will show the hours that you have input by selecting Tools | Statutory Return Tools | Update Class Types

If you need to update this information, click on the Edit button then OK button. You will now be able to edit/update the Class Types. Please see page 13 for further information. Amend and Save the amended data as necessary.

**Panel 5 Top-Up Funding**

Initially the screen will show the hours that you have input by selecting Tools | Statutory Return Tools | Update Top-Up Funding

If you need to update this information, click on the Edit button then OK button. You will now be able to edit/update the Top-Up Funding. Please see page 18 for further information. Amend and Save the amended data as necessary.

**Panel 6 Post Looked After Arrangements**

Initially the screen will show the hours that you have input by selecting Tools | Statutory Return Tools | Update Post Looked After Arrangements

If you need to update this information, click on the Edit button then OK button. You will now be able to edit/update the Post Looked After Arrangements. Please see Page 20 for further information. Amend and Save the amended data as necessary.

**Panel 7 School Dinner Taken**

**Entering School Dinners Taken Details**

You need to indicate whether the pupil has taken a school provided lunch. This data item will be used to inform the allocation of funding.

If your school uses SIMS Dinner Money or SIMS Attendance, the number of dinners taken on census day can be calculated using the data recorded when using these modules. If either or both of these modules are not in use, the applicable Calculate From... button(s) are not displayed but the information can be recorded manually.
Calculate From Attendance will populate the School Dinner Taken column based on whether a pupil is has been marked present on census day. If the pupil did not take a school provided dinner the tick should be removed from the School Dinner Taken column.

Tick All can be used if attendance is not entered directly into SIMS on a daily basis and the ticks removed as necessary for pupils that did not take a meal.

Calculate From Dinner Money will populate the School Dinner Taken column based on whether a pupil has been marked as taking a dinner on census day in the SIMS Dinner Money.

The Reference Date defaults to 06/10/16 but can be amended only if the situation on census day is abnormal.

Panel 8 Attendance Panel

Attendance Errors

Attendance data for all statutory school aged students will automatically be entered directly into the School Census return. You must have made sure that attendance data is up-to-date for the period of 17/04/17 to 31/07/17 as this return collects attendance data for Terms 5 and 6.
Once the information is complete click on **Save** to save the details of the Autumn 2017 School Census return so far.

**Helpful Hint**
You can **save** and **exit** then validate your School Census return at a later stage. Alternatively, click **Create & Validate** at the top of the screen if you wish to continue. Instructions on Validating your return are shown on the next page.

**Schools not using SIMS Attendance**

If Attendance/Lesson Monitor is not in use, the following data must be entered manually for the two specified collection periods, i.e. 17/04/2017 to 29/05/2017 and 29/05/2017 to 31/07/2017:

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

1. To filter the display of students in the **Attendance** panel, select **Year Group**, **Registration Group** or **Enrolment Status** from the **Group By** drop-down list.
2. Alternatively, select **Group by None** to display a list of all students.
3. To sort the displayed data by surname, forename, year group, registration group or enrolment status, click the appropriate column header.
4. For each student, enter the correct attendance numbers in the **T Poss Sessions**, **T Auth Absences** and **T Unauth Absences** columns for each of the collection periods.
5. 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.
Panel 9 Learning Aims

Checking Post 16 Learning Aims Data

Learning Aims data is collected from Secondary schools with Sixth Forms, (including Middle deemed Secondary schools, All-Through school, Pupil Referral Units, City Technology Colleges and Academies (including Free schools)).

The Post 16 Learning Aims are collected once a year only, in the School Census Autumn Return. Learning Aims are collected from the previous year, i.e. any that were active in 2016/2017 and those for the current academic year 2017/2018.

All Learning Aims in the specified period (01/08/2016 to 05/10/2017) are included in the return, regardless of whether the minimum qualifying period of six weeks, for a one or two year course, was achieved.

Exam results, e.g. A, A*, etc. and the outcome of the previous year’s Learning Aims (pass, fail or result not known) are not collected in this year’s Autumn return. However, results are displayed in the Learning Aims panel for identification purposes only, provided that the Use Exam Result to determine QN/Discount code check box has been selected (in the Source for Learning Aims Planned End Date dialog) when calculating all details.

Discount Codes are collected in the School Census Autumn 2017 Return.

**IMPORTANT NOTES:**

Learning Aims are required for learners in National Curriculum Year Group (Year Taught In) 12 or above for whom the school wishes to claim Post 16 funding from the Education Funding Agency (EFA).

Learners are expected to be in National Curriculum Year 12 and above if the majority of their learning is at level 3 or above.

Students in Actual National Curriculum Year Group 11 (or below) with the majority of their learning at level 2 are no longer included in the return.

The Learning Aims panel includes the following functionality:

- QN and Discount codes.
- Result for identification purposes only.
- Comprehensive filtering of data
- Recalculating data in the Learning Aims panel refreshes the display with data from Course Manager and Examinations Organiser. Any saved edits are preserved when the Recalculate routine is run
- The provision of the following reports to assist with the checking of information:
  a. Learning Aims Comparison with Course Manager report
  b. Learning Aims Comparison with the Previous Autumn report
- By default, the data in the Learning Aims panel cannot be edited. Full editing, i.e. the Learning Aims start date, end date, planned end date, core aim, status, withdrawal reason, QAN, discount code, traineeship and provider UKPRN, can be achieved by clicking the Padlock icon to unlock the Learning Aims panel.

Example of Locked/Unlocked Padlock icon
### Autumn School Census 2017: Guidance Notes for All-Through Schools

#### 5 Learning Aims

| Surname | Forename | YTI | UIN | Subject | Level | Start Date | End Date | P End Date | Core AL | Status       | Withdrawn Reason | Withdrawn Reason Details | QAN | Discoun. | Provider UNPR | Trafemeh | Result |
|---------|----------|-----|-----|---------|-------|------------|----------|------------|---------|-----------|----------------|----------------------|----------------------|-----|---------|-------------|----------|--------|
| Abbey   | Grenville| 13  | 1111171873 | Art     | GCE Advanced Subsidi. | 01/09/2016 | 21/07/2017 | 21/07/2017 | Completed | Completed | 0149577 | 1A2                | 60149577 | 1219  | 50090628 | 2319  | C      |
| Abbey   | Grenville| 13  | 1111171873 | Business Stu. | GCE A Double Award | 01/09/2016 | 21/07/2017 | 21/07/2017 | Completed | Completed | 0146722 | 3219  | 50090628 | 2319  | C      |
| Abbey   | Grenville| 13  | 1111171873 | HND Business & Real | GCE Advanced Subsidi. | 01/09/2016 | 21/07/2017 | 21/07/2017 | Completed | Completed | 0146722 | 3219  | 50090628 | 2319  | C      |
| Abbey   | Grenville| 13  | 1111171873 | Physics | GCE Advanced Subsidi. | 01/09/2016 | 21/07/2017 | 21/07/2017 | Completed | Completed | 0146722 | 3219  | 50090628 | 2319  | C      |
| Ackton  | William  | 13  | 1111176603 | CDT Des & Real | GCE Advanced Subsidi. | 01/09/2016 | 21/07/2017 | 21/07/2017 | Completed | Completed | 0146722 | 3219  | 50090628 | 2319  | C      |
| Ackton  | William  | 13  | 1111176603 | Chemistry | GCE Advanced Subsidi. | 01/09/2016 | 21/07/2017 | 21/07/2017 | Completed | Completed | 0146722 | 3219  | 50090628 | 2319  | C      |
| Ackton  | William  | 13  | 1111176603 | French | GCE Advanced Subsidi. | 01/09/2016 | 21/07/2017 | 21/07/2017 | Completed | Completed | 0146722 | 3219  | 50090628 | 2319  | C      |
| Ackton  | William  | 13  | 1111176603 | Mathematics | GCE Advanced Subsidi. | 01/09/2016 | 21/07/2017 | 21/07/2017 | Completed | Completed | 0146722 | 3219  | 50090628 | 2319  | C      |
| Adams   | Melanie  | 13  | 1111165696 | Art    | GCE Advanced Subsidi. | 01/09/2016 | 03/02/2017 | 21/07/2017 | Completed | Withdrawn Injury Illness | 01495093 | 3519  | 50090628 | 2319  | B      |
| Adams   | Melanie  | 13  | 1111165696 | Biology | GCE Advanced Subsidi. | 01/09/2016 | 21/07/2017 | 21/07/2017 | Completed | Completed | 01495093 | 3519  | 50090628 | 2319  | B      |
| Adams   | Melanie  | 13  | 1111165696 | Geography | GCE Advanced Subsidi. | 01/09/2016 | 21/07/2017 | 21/07/2017 | Completed | Completed | 01495093 | 3519  | 50090628 | 2319  | B      |
| Adams   | Melanie  | 13  | 1111165696 | Law    | GCE Advanced Subsidi. | 01/09/2016 | 21/07/2017 | 21/07/2017 | Completed | Completed | 01495093 | 3519  | 50090628 | 2319  | B      |
| Ahmed   | Ackmar   | 13  | 1111171849 | Art    | GCE Advanced Subsidi. | 01/09/2016 | 23/02/2017 | 21/07/2017 | Completed | Withdrawn Personal | 01495777 | 1A2   | 50090628 | 2319  | A      |
| Ahmed   | Ackmar   | 13  | 1111171849 | English Lit | GCE Advanced Subsidi. | 01/09/2016 | 21/07/2017 | 21/07/2017 | Completed | Completed | 01495777 | 1A2   | 50090628 | 2319  | A      |
| Ahmed   | Ackmar   | 13  | 1111171849 | Mathematics | GCE Advanced Subsidi. | 01/09/2016 | 20/01/2017 | 21/07/2017 | Completed | Completed | 01495777 | 1A2   | 50090628 | 2319  | A      |
| Amal    | Tanzeel  | 13  | 1111171822 | English | GCE Advanced Subsidi. | 01/09/2016 | 21/07/2017 | 21/07/2017 | Completed | Completed | 01495777 | 1A2   | 50090628 | 2319  | A      |
| Amal    | Tanzeel  | 13  | 1111171822 | Law    | GCE Advanced Subsidi. | 01/09/2016 | 21/07/2017 | 21/07/2017 | Completed | Completed | 01495777 | 1A2   | 50090628 | 2319  | A      |
| Amal    | Tanzeel  | 13  | 1111171822 | Sociology | GCE Advanced Subsidi. | 01/09/2016 | 21/07/2017 | 21/07/2017 | Completed | Completed | 01495777 | 1A2   | 50090628 | 2319  | A      |
| Total   |          |     |       |         |       |            |           |            |         |           |                |          |         |             |         |        |

Total: 590
<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>To sort the displayed data by column data, e.g. <strong>Surname</strong>, <strong>Forename</strong>, <strong>YTI</strong>, <strong>ULN</strong>, etc, click the applicable column heading.</td>
</tr>
<tr>
<td>2</td>
<td>The Compare with Previous Autumn report can be run to compare the Learning Aims in the School Census Autumn 2016 Return with the Learning Aims to be reported in the School Census Autumn 2017 Return. The differences are highlighted in yellow.</td>
</tr>
<tr>
<td>3</td>
<td>The Compare with Course Manager report can be run to compare Learning Aims to be reported in the School Census Autumn 2017 Return with data held in Course Manager.</td>
</tr>
<tr>
<td>4</td>
<td>The <strong>Add</strong> button is active only when the <strong>Unlock Padlock</strong> icon is displayed. Learning Aims records can be added to the list by clicking the <strong>Add</strong> button to display the <strong>Add Learning Aims</strong> dialog, from where the required student's Learning Aim(s) can be selected.</td>
</tr>
<tr>
<td>5</td>
<td>The <strong>Exclude/Restore</strong> toggle button is active only when the <strong>Unlock Padlock</strong> icon is displayed. A Learning Aim record can be excluded from the list, and consequently from the return, by highlighting it then clicking the <strong>Exclude</strong> button. The excluded Learning Aim record is then highlighted in dark grey and is read-only. To <strong>restore</strong> the Learning Aim record, click the record to ensure that the focus is on the Learning Aim then click the <strong>Restore</strong> button.</td>
</tr>
<tr>
<td>6</td>
<td>The data in the <strong>Learning Aims</strong> panel can be filtered using one or more of the <strong>Search</strong> options, i.e. <strong>Surname</strong>, <strong>Forename</strong>, <strong>YTI</strong> (Year Taught In), <strong>ULN</strong>, <strong>QAN</strong>, <strong>Discount Code</strong> (<strong>Disc Code</strong>), <strong>Subject</strong>, <strong>Level</strong>, <strong>Status</strong> and date range (by default <strong>From</strong> 01/08/2016 <strong>To</strong> 05/10/2017). Using these filters restricts the data displayed in the <strong>Learning Aims</strong> panel only. They do not restrict the data that is collected in the School Census. To view all the Learning Aims data that is collected in the School Census, remove all filter conditions then click the <strong>Search</strong> button.</td>
</tr>
<tr>
<td>7</td>
<td>Clicking the <strong>Recalculate</strong> button refreshes the <strong>Learning Aims</strong> panel with Learning Aims from Course Manager and exams data from Examinations Organiser. <strong>IMPORTANT NOTE</strong>: Clicking the <strong>Recalculate</strong> button preserves any manual edits that have already been saved (<strong>Learning Aims</strong> panel only).</td>
</tr>
<tr>
<td>8</td>
<td>The <strong>Locked Padlock</strong> icon indicates that editing of Learning Aims data is unavailable. Click the <strong>Padlock</strong> icon to toggle between locked and unlocked. It is advisable to check with your support unit before unlocking the Learning Aims. If you wish to edit the Learning Aims data, including adding and/or excluding Learning Aim records, ensure that the <strong>Unlocked Padlock</strong> icon is displayed. Full editing capabilities are then available for the data in the rows displayed with a white background.</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>---</td>
<td>---</td>
</tr>
</tbody>
</table>
| 9 | The **Result** column is displayed only if the **Use Exam Result to determine QAN/Discount** code check box has been selected (in the **Source for Learning Aims Planned End Date** dialog) when calculating all details.  
The data in the **Result** column is displayed for reference only. Exam Results are not collected in the Autumn 2017 return. |
| 10 | **A Traineeship** is an education and training programme. Traineeships (designed for 16 to 24 year olds) include the work preparation training, English and/or Maths and the work experience needed to secure an apprenticeship or employment.  
An indication as to whether each Post 16 Learning Aim (for the academic year 2017/2018) is part of a Traineeship is required for the School Census Autumn Return. The indicator can be set in the **Membership and Results** panel via **Tools | Academic Management | Course Manager | Maintain Course.** |
| 11 | The **AO QN** and **Discount** code are reported in the census where an exam result exists. QWS QNs are reported only where an exam result is not available. The **AO QN** and QWS QN for the student can be viewed by selecting **Focus | Student | Courses**, double-clicking the required course to display the **Course Details** page then navigating to the **Membership and Results** panel. |
| 12 | The DfE/EFA use the QN for matching the Learning Aim. The QN data is included in the On Roll Learning Aims report and Leavers Learning Aims report. |
| 13 | The **Provider UKPRN** (sub-contracting UK partner) should be recorded where the school sub-contracts the provision of learning or training for post 16 pupil/students. |
| 14 | Reason for withdrawal are required for Learning Aims ending in the collection period.  
When a pupil/student has withdrawn from a Learning Aim prior to the census day, the Learning Aim is recorded with a completion status of **Withdrawn**. The reason for withdrawal should also be recorded. |
| 15 | The **Status** shows if a Learning Aim has been completed, withdrawn or is continuing. A cell with a yellow background is highlighted when the status has been edited manually. A yellow highlight does not indicate an error. |
The **Core Aim** is the primary Learning Aim being undertaken in a student's programme of study. The School Census Autumn 2017, requires that the core aim is identified for each year where a vocational Education Funding Agency (EFA) study programme is being followed. If a student is following an academic programme, a core aim does not need to be identified.

It is possible to have a different Core Aim for 2016/2017 than for 2017/2018. Although Course Management only allows one Core Aim per student per academic year, there are certain unusual circumstances where more than one Core Aim is allowed. The additional Core Aims can be entered directly into this panel by clicking the **Add** button then completing the details in the different columns.

The Planned End Date (**P End Date**) included in the return must always be the date agreed when the Learning Aim commenced and must not reflect any change of plan for the Learning Aim. The only reason for changing the Planned End Date in the return is that it was entered incorrectly in the first place and even then, it would be best to leave it as first entered unless it results in distortion, e.g. ends in August or in the wrong academic year.

If plans change and the pupil/student is expected to complete the Learning Aim earlier than the Planned End Date agreed when the Learning Aim commenced, that Planned End Date is not changed but this earlier than originally expected end date is eventually reflected in the actual **End Date**.

If plans change and the pupil/student is expected to complete the Learning Aim later than the Planned End Date agreed when the Learning Aim commenced, that Planned End Date is not changed but this later than originally expected end date is eventually reflected in the actual **End Date**.

If the planned end date has been overwritten with data from the previous Autumn return, the cell is highlighted in yellow.

The **Total** number of Learning Aim records is displayed at the bottom left-hand side of the **Learning Aims** panel.

Double-clicking a pupil/student's name displays the **Student Courses** page, where all student Learning Aims are displayed. Clicking one of these Learning Aims displays the **Members** panel on the **Course Details** page (Tools | Academic Management | Course Manager | Maintain Course), where edits can be made to the Learning Aim record.

Clicking the **Select Columns** button displays the **Select Student Column to Display** dialog, where columns can be selected or deselected. This provides additional data for information purposes only. Select from **YTI, Reg, Ad No, ULN, UCI** and **Int Cand No**. The **YTI** and **ULN** columns are displayed by default. The data in these columns is read-only.
The Learning Aims panel is provided to enable you to check the Learning Aims that will be included in the School Census Autumn 2017 Return.

If the Learning Aim Planned End Date (P End Date) has been populated from the autumn 2016 return and the date you hold in Course Manager differs from that previously reported the cell is highlighted in yellow.

NOTE: Although Qualification and Non-qualification hours are collected or the Census return they will not be displayed in the Learning Aim panel within the school census. Additional detailed reports will be available within the school census return to check the data to be reported.

The Learning Aims panel collects information from Maintain Course and from the previous autumn census file (if available). The two rows of fields at the top of the panel and the Search button can be used to search for specific data within the return. The Select Columns button allows other fields of student information to be selected or removed from view.
The panel also allows for the following:

**When locked (default)**

- No items can be edited.
- No learning aims can be added or deleted.

**When unlocked** (the return can be unlocked by clicking onto the padlock top right of the panel).

- Start Date, End Date, Planned End Date, Status, QN, Discount Code and Core Learning Aim can be edited.
- Additional learning aim entries can be added.
- Learning aim information can be excluded.

Conflicting exam results will show in red in the Learning Aims panel, just as they would in the Maintain Course screen, if they have not been rectified.

1. Click the **Compare with Previous Autumn** button. This report can be run to compare the learning aims reported for the school census autumn 2016 with the learning aims to be reported for the school census autumn 2017. The differences are highlighted in yellow but are not necessarily errors.
2. You may be asked to select the previous return.
3. Highlight the **School Census Autumn 2016** return, and then click the **OK** button.
4. You may be prompted to **Save** before continuing.

**NOTE**: It will be possible to record more than one core aim directly in the census return. However, the date for the learning aims should not overlap.

It may be necessary to save several times as this panel is checked. SIMS will display a message when a save is required.

Comparisons between this data and the corresponding learning aims data in the previous census can only be made if the previous census:
• Has been authorised.
• Is saved in the census folder.

The EFA are keen for schools to ensure that data matches as accurately as possible with previous census returns. Changes in the Start and Planned End Dates are to be avoided where possible.

Discrepancies in dates are highlighted on this report in a light yellow colour.

5. Click the **Compare with Course Manager** button.

6. Click the **Recalculate** button. This will refresh the Learning Aims from Course Manager. It will preserve any manual edits.

7. Click the **No** button to cancel the Recalculate at this stage as this is investigated in the next activity.

**Editing Learning Aims**

By default, while the census is locked (signified by the padlock) no data fields can be edited.

To activate the **Add** and **Exclude** buttons so that learning aims can be removed and additional learning aims added, the census should be unlocked by clicking onto the padlock.

**NOTE:** The Census panel should only be unlocked if absolutely necessary. All learning aim information should be held in Course Manager (Maintain Course) whether created automatically or manually.
After the Census return has been unlocked the method to remove or add a learning aim directly into the census is described below.

**To remove a learning aim record:**
1. Highlight the **Learning Aim**, and then click the **Exclude** button.

2. The Learning Aim row will appear shaded to signify it will not be included in the return. If a shaded row is selected the **Exclude** button will change to **Restore**. Click the **Restore** button to reverse the exclusion.

**To add a Learning Aim record:**
1. Click the **Add** button to add a new learning aim. The **Add Learning Aim** wizard will start. Use the **YTI** (Year Taught in) drop down list and other criteria boxes to find the student required. Click the **Next** button.

2. In the **QAN** screen type the **QAN code required** in the **QAN / Discount Code** field and click the **Search QAN** button. Highlight the qualification and click the **OK** button.
The additional row will appear at the end of the learning aims.

3. Complete the **Start Date**, **End Date**, **P End Date** and **Status** field if necessary.

   **NOTE**: As the record has been added manually then no exam result is required. *It is advisable, where possible, to make the changes in Course Manager and not directly in the census return.*

4. Click the **Save** button.
Creating and Validating the Return

You must Create & Validate the return again on or after 5th October 2017 even though most of the work can be prepared in advance.

If you have exited from the return you will need to choose the following route to create & validate the return:

Routines | Statutory Returns | School Census and click on Search. Double click on the relevant return to be created & validated to bring the detail panels to screen.

A message will appear stating that the Validation is taking place.
Viewing Errors on the Return

When the validation process is complete, the Validation Errors Summary panel is displayed at the bottom of the Census Return Details page. **These should not exist if you have already completed the Dry Run process.**

If any errors are generated you will be presented with a screen similar to the one shown below.

Errors with a **Type of F** must be investigated and resolved. Errors with a **Type of Q** are queries but these must be checked to ensure that data has not been excluded by mistake, or that the entry you have made is correct as it may not be what the software expected. **BIPI will be verifying with schools, all queries as part of the Local Authority validation process.**

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

You are required to email BIPI at: education@northamptonshire.gov.uk with an explanation of all outstanding queries.

Please add your school name and DfE number in the subject line.
Detailed Reports

These should have been checked as part of the Dry Run process. Please refer to page 32 for further help

Producing the Summary report

Once the errors have been resolved and the return has been validated for the final time, it is necessary to produce a paper copy of the Summary report for the Head Teacher to check.

All the details must be checked thoroughly and then the paper copy signed by the Head Teacher.

The figures shown here summarise your census return, and will have an impact on the funding allocated to your school if it is incorrect, so it is imperative that it is checked and all figures are accurate.

It is strongly recommended that this copy be kept in school for audit purposes.

1. Double click on the final, successfully validated report. Click on the Summary button to create the summary. This can then be printed.

The Head Teacher MUST check and sign the summary report before you move on to the next stage of authorisation

Authorising the Return

Once all the errors have been resolved and the summary has been checked and any anomalies cleared, it is necessary to authorise the return before it can be sent to BIPI/DfE.

1. Ensure that the return is open.
2. Click on Authorise to authorise the return.

Once a return has been authorised it is not possible to edit any of the details on it. It is possible to reprint the summary sheet. (If the return needs amending a new one can be created and copied from the old one – see page 61).
3. Click on Yes.

4. Confirm (using the tick box) that the Head Teacher is satisfied that the Summary and detailed reports have been checked.

5. Click on the Continue button.

After a short while the summary and an Authorisation Report will appear on screen. You may wish to print these off for your records or close the reports.

6. Close the screen.

7. Click on the OK button

If the return needs amending after Authorisation it will have to be recreated from a copy of the original one – see Page 61.
Deleting a School Census Return

On occasions, a return may need to be deleted (e.g. you have created one or more dry runs in preparation for the main return.) A return can be deleted at any time prior to authorisation. An authorised school census return file cannot be deleted.

1. Select Routines | Statutory Returns| School Census to display the Census Return browser.
2. Select the census return file that you want to delete and click the Delete button.
3. Confirm that you want to delete the selected return.
4. The selected return will be deleted and removed from the Census Return browser.

Sending / Receiving files to the LA via AnyComms (AVCO)

NOTE FOR ACADEMIES
Academies should upload their Census file directly onto the Secure Access website but it is requested that AVCO is then run so that the Census files can also be sent to the LA.

Using AnyComms

The same process is used to either send or receive files via AVCO Secure File Transfer. The procedure looks for files in the relevant inboxes and outboxes and sends/receives as necessary.

To send the file containing the Census return to the LA click on the Start button and select All programs, AnyComms Client and select the route as shown below.

Click Start Call.
At this point you can follow the progress of the connection by watching for several visible indicators shown in the port status and the call status.

The School Census file and the Summary file will automatically be sent to the Local Authority.

The Autumn School Census 2017 return must be completed and returned to the LA by Friday 6th October 2017.
Copying and Editing Your Return

If, after authorising the School Census return, you need to amend it for any reason it is possible to create a new one from a copy of the authorised one. To do this choose route Routines | Statutory Returns | School Census.

The screens below are example screens only.

Click on the **Search** button.

Highlight the return and click on the **Copy** button.

Click on **Yes** to make a copy of the highlighted return.

Double click on the copy of the return to open it. You can now edit or make amendments as necessary.

You **MUST** Create & Validate, Produce a Summary Report and then Authorise the new return.

You will now need to run AnyComms as normal (see page 59) to send the re-created return and the summary file to the Local Authority or upload the new file to the Secure Website.
Checking Free School Meals Eligibility

The collection of free school meal eligibility at any point since the last census day (including those eligible on census day) is collected for the return.

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

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

- **Start Date**
- **End Date** (if known)
- **Country** (UK).
- **Meal Patterns** are not required for the return but can be recorded for information purposes only. Select Focus | Student | Student Details to display the Find Student browser.

**If you need to make changes to Free school meal data**

1. Search for then double-click the required student to display the Student Details page.
2. Click the Dietary hyperlink to display the Dietary panel.

3. Ensure the minimum of a Start Date is displayed in the Eligible for Free Meals panel. If a new record is required, click the adjacent New button to display the Add Student Free Meal Details dialog.
4. Enter the **Start Date** (and **End Date** if applicable) for the free meal period, as supplied by your Local Authority.

5. Ensure that the **Country** in which the eligibility applies is correct. Select from the drop-down list, if required.

6. Notes can be entered, if required.

7. Click the **OK** button to return to the **Dietary** panel, where the new information is displayed.

8. Click the **Save** button to save any changes.

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

**Checking Special Educational Needs Information**

**SEN Status** as well as new data items **Member of SEN Unit** and **Member of resourced provision indicator** are collected in this return:

- **SEN Status** (SEN Provision)
  - N – No Special Educational Need
  - S – Statement (available for use until April 2018)
  - E – Education, Health and Care Plan
  - K – SEN Support.

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. Additional search criteria can be selected, if required, e.g. **Year Group**.
3. Click the **Search** button to display a list of students who match the criteria.

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

5. Check the details displayed in the **Basic SEN Details** panel, ensuring that the **Status** is correct. If necessary, select the correct **Status** from the drop-down list.

6. Be careful to ensure that the **Start Date** accurately reflects the change of status.

**NOTE**: **N - No Special Educational Need** should be used only if a **SEN Status** was previously assigned.

7. If the student has either a resourced provision and/or Time in the SEN Unit, then these should be added or amended in the Provisions panel (Panel 8).
8. Click **Save** if any changes have been made.
Checking Exclusions Information

Exclusions information is required for students who were subject to any exclusion with a start date during the period 01/01/2017 – 16/04/2017 (Easter Sunday) 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 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 exclusion related data items are collected for the return:

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

**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.

Run the Exclusions Report

A report exists, where you can enter a date range and produce a list of those students that have exclusions within those dates.

1. Click on **Report | Run Report | Focus Student | EXC – Exclusions with dates**
2. You will be asked for a date range. Use the dates **01/01/2017 – 16/04/2017**.
3. Then click **OK**.

A Word document will open showing all the students excluded within that time period.
Recording an Exclusion

Any missing exclusions must be added.

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 and End Time from the drop-down list, i.e. AM or PM.
7. Click the **Calculate** button to populate the **Length School Days** field automatically.

![Add Exclusion](image1)

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.

![Exclusion Details](image2)

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

![Total in Academic Year 2016/2017](image3)

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

**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**

The **Date of Leaving** is collected for all schools.

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.

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

5. In the **Leaving Information** panel, enter the **Date of Leaving** or click the **Calendar** button and select the required date.
   
   The date of leaving should be the date that the student is actually leaving the school.

6. Select the **Reason for Leaving** from the drop-down list, then either:

7. Optionally, enter the **Destination after Leaving**, if known.

8. Enter the **Destination Expected Start Date**, if known.

9. For any student in the sixth form, enter a **Learning aim Withdrawal Reason**, 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.

10. To remove a student from the list, highlight their name then click the Remove button.

11. To clear the contents of the Date of Leaving, Reason for leaving and Destination after Leaving fields, highlight the required student(s) then click the Clear button. Re-enter the information as required.

12. Click the Save button. A prompt will be given, click Yes.

Re-Admitting a Student

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

NOTE: Do not remove the leaving date, as the student’s period of absence from the school will not be recorded. 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 displayed on the Student Details page.

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

7. Check that the original UPN is displayed.

8. 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.
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 opportunity to review and print their information before deleting their record permanently. You should contact LGSS – Business Systems Team on 01604 366300 if you have to permanently delete a student.

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

Checking National Curriculum Year Groups

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 has been recorded in SIMS.

The Age at Date for this return is 31/08/2017

The following table shows the Curriculum Year that students in England are expected to be taught in according to their date of birth (during the academic year 2017/2018).
<table>
<thead>
<tr>
<th>Curriculum Year the Student would Normally be Taught in</th>
<th>Date of Birth Range</th>
<th>Age Range</th>
</tr>
</thead>
<tbody>
<tr>
<td>E1</td>
<td>01/09/2016 to 31/08/2017</td>
<td>0 -1</td>
</tr>
<tr>
<td>E2</td>
<td>01/09/2015 to 31/08/2016</td>
<td>1 - 2</td>
</tr>
<tr>
<td>N1</td>
<td>01/09/2014 to 31/08/2015</td>
<td>2 – 3</td>
</tr>
<tr>
<td>N2</td>
<td>01/09/2013 to 31/08/2014</td>
<td>3 – 4</td>
</tr>
<tr>
<td>R</td>
<td>01/09/2012 to 31/08/2013</td>
<td>4 – 5</td>
</tr>
<tr>
<td>1</td>
<td>01/09/2011 to 31/08/2012</td>
<td>5 – 6</td>
</tr>
<tr>
<td>2</td>
<td>01/09/2010 to 31/08/2011</td>
<td>6 – 7</td>
</tr>
<tr>
<td>3</td>
<td>01/09/2009 to 31/08/2010</td>
<td>7 – 8</td>
</tr>
<tr>
<td>4</td>
<td>01/09/2008 to 31/08/2009</td>
<td>8 – 9</td>
</tr>
<tr>
<td>5</td>
<td>01/09/2007 to 31/08/2008</td>
<td>9 – 10</td>
</tr>
<tr>
<td>6</td>
<td>01/09/2006 to 31/08/2007</td>
<td>10 – 11</td>
</tr>
<tr>
<td>7</td>
<td>01/09/2005 to 31/08/2006</td>
<td>11 – 12</td>
</tr>
<tr>
<td>8</td>
<td>01/09/2004 to 31/08/2005</td>
<td>12 – 13</td>
</tr>
<tr>
<td>9</td>
<td>01/09/2003 to 31/08/2004</td>
<td>13 – 14</td>
</tr>
<tr>
<td>10</td>
<td>01/09/2002 to 31/08/2003</td>
<td>14 – 15</td>
</tr>
<tr>
<td>11</td>
<td>01/09/2001 to 31/08/2002</td>
<td>15 – 16</td>
</tr>
<tr>
<td>12</td>
<td>01/09/2000 to 31/08/2001</td>
<td>16 – 17</td>
</tr>
<tr>
<td>13</td>
<td>01/09/1999 to 31/08/2000</td>
<td>17 – 18</td>
</tr>
<tr>
<td></td>
<td>31/08/1998 or earlier</td>
<td>19+</td>
</tr>
</tbody>
</table>

The suggested method for checking a student’s curriculum year and date of birth in SIMS is:

- via individual student records ([Focus] [Student] [Student Details]).
Checking the Student’s Year Taught In Record

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

**NOTE:** Any change made in the Registration panel is effective from today’s date. If the Year Taught In change was applicable from an earlier date, click the History button and apply the change from the actual date the change is required. If in any doubt, please contact the Capita helpdesk on 0844 8922406.

(Calls to 0844/0845/0870 numbers will cost three pence per minute, plus your phone company’s access charge.)

It is important to thoroughly check any queries that might be listed in the Census dry runs. Any student considered to be in the wrong year for their age will appear as a query.

Checking Enrolment Status and Admission Date

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 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. Click the **Save** button.

### Checking Unique Pupil Numbers

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.

**Using the Quick Search facility**

1. Type ~U in the **Quick Search** field at the top of the SIMS Home Page, and then press the **Enter** key or click the **Quick Search** icon.

A list of people recorded in SIMS who match the search criteria of missing UPN are displayed.

2. **Double click** on the radio button next to a student’s name. The record will open.

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

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

5. Select either the **Issue Permanent UPN** or **Issue Temporary UPN** radio button.
6. Click the **OK** button to return to the **Registration** panel.
7. Click the **Save** button to save any changes. The UPN is generated automatically when the record is saved.
Checking 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. This applies to all students over the age of 14.

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

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

A ULN must be entered for every child over the age of 14.

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

Checking Additional Information

Ensure that the following additional information is recorded in SIMS:

- Youth Support Services Agreement (YSSA) status (students aged 12 or above only).
  This applies to students between age 12 and 25 with special educational needs and students between age 12 and 20 with no special educational needs.
The Bulk Update routine can be used to assign and edit these values for a specific selection of students at the same time, if required (please see Updating Information Using the Bulk Update Routine on page 24).

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. Ensure that the Pupil Premium Indicator for year 2017/2018 check box is selected, if applicable. To enter a note related to the applicable year, click the Search button adjacent to the Notes field.
   - Although Pupil Premium information is not collected for the return, it is important for schools that are in receipt of this funding to be able to give a full account of its use. The national school performance tables now includes information about the progress of students in receipt of Pupil Premium and information is required to be sent to parents about how it has been used and what impact it has had on pupil progress.
5. Select the applicable Youth Support Services Agreement (YSSA) status from the drop-down list.
6. If you have made any changes, click the Save button.
Updating Cultural Information

Nationality, Country of birth and First language are the only cultural information collected in this return.

These data items can all be found in the Ethnic/Cultural Panel 8 on a student’s record or in the Bulk Update routine.

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 at home or in the community.

If the child was exposed to more than one language (which may include English) during early development, the language other than English should be recorded, irrespective of the student’s proficiency in English.

Using the Quick Search facility

1. Type ~F in the Quick Search field at the top of the SIMS Home Page, and then press the Enter key or click the Quick Search icon.

A list of people recorded in SIMS who match the search criteria of missing First Language.
Those students with a missing First Language are displayed.

**Editing the students record**

9. Select **Focus | Student | Student Details** to display the **Find Student** browser.

10. Search for and then **double-click** the required student to display the **Student Details** page.

11. Click the **Ethnic/Cultural** hyperlink to display the **Ethnic/Cultural** panel.

12. Select the student’s **First Language** from the drop-down list.

13. Click the **Save** button.

14. To add a **Country of Birth**, click the browser icon to the right of Country of Birth. Choose the required Country and click **OK**.

15. To add a **Nationality**, click **New** to the right of the Nationality and Passport details panel. Click on the browser icon to the right of the Nation.

16. Choose the required Nationality and click **OK**.
For any student whose First language is not English, a level is required for their Proficiency in English.

17. To add a Proficiency in English (Not collected until the spring census return), click New

18. Amend the Date of Assessment, if necessary and choose a Level of Proficiency. Then click OK.

19. Some data in this panel will only have been applied from today’s date. In particular Ethnicity and First Language. However, if the student started prior to today, then click the History button.

Changing the History

This screen shows you at what point data was entered onto the system and the date the student was admitted. All the orange bars need to completely fill the white space (ie the date of admission).
1. **Double click** on the orange bar to be changed. You may need to scroll down the next screen to see the orange bar.

2. Again **double click** on the orange bar to be changed.

3. Change the **Start Date** to the **Date of Admission**.

4. Click **OK**
5. The line should now completely fill the white area. Click **OK**.

Repeat this process for any other bars that do not completely fill the white area. Although this census (Autumn 2017) only collects First Language data affected by the time bar, other censuses collect different data from this panel and the data should accurately reflect the student’s data.

6. Click **Save**.
Checking Attendance Information

Termly attendance data should be provided for students aged 4 to 15 inclusive on 05/10/2017 who were on-roll for at least one session during the period from the start of the Summer term 2017 to the end of July (17/04/2017 to 31/07/2017)

The attendance data collected in this school census return includes:

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

Attendance data is captured automatically for the return, provided 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.

Dealing with Missing Marks

1. Click on Focus | Lesson Monitor (or Attendance) | Deal with Missing Marks
2. Amend the **date range** to reflect the attendance period collected for the census. I.e. **17/04/2017 to 31/07/2017**
3. Change the **Group Type** to Whole School
4. Change the **View** to Sessions
5. Click **Search**
6. Click on Open for a list of children with missing marks.

7. Enter the appropriate codes within the mark column and Save.