Preparing Post 16 data for the Autumn 2017 School Census
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

We are always interested to hear your views on our documentation to ensure we continue to provide high quality guidance and would welcome your feedback.

Please reply to: support@dotict.co.uk
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Introduction

This guide has been produced to identify the most common Post 16 data entry and checking tasks that need to be carried out to ensure that the information in your School Census Autumn 2017 relating to your Post-16 students is correct.

The guide is applicable to English maintained Secondary/middle deemed Secondary and All-Through schools, Pupil Referral Units, CTCs and Academies that have sixth form students.

For funding purposes, Post-16 students are expected to be enrolled in a programme of study that leads to an external certificate offered by a regulated awarding organisation and appearing on section 96. Information about Post-16 programmes of study as well as information about Learning Aims continues to be collected as before, however, for the first time UK Provider numbers are being collected as well as prior attainment in English and mathematics. Withdrawal reasons are also required where a student has withdrawn from a course before completion. It is important that all of this information is correct, as it affects your school’s funding.

Schools with a Sixth Form are required to provide details about Learning Aims once a year in the School Census Autumn Return.

The return collects information about Learning Aims that were undertaken during the academic year 2016/2017 as well as those that were started or continued during the academic year 2017/2018. Learning Aims are collected for students taught in Year 12 and above during the Learning Aim collection period (01/08/2016 to 05/10/2017).

Schools must ensure that the Learning Aims submitted in the return are those for which they wish to claim funding. Local Authorities and Academies should refer to the DfE website (https://www.gov.uk/government/collections/funding-education-for-16-to-19-year-olds) for relevant information.

Examinations Organiser, Course Manager and Academic Management all support the collection, maintenance and reporting of this data. If you do not have detailed knowledge of all these areas you should consult with colleagues who do, as correct completion of the school census has a direct bearing on the school’s income.

For further guidance about funding please refer to the EFA Funding Regulations available via the following link:

https://www.gov.uk/guidance/16-to-19-education-funding-guidance

Before beginning the process of checking Post 16 data, you should ensure that all student level and school level information is present and up-to-date.

In order to actually produce the school census, you will need to have the permissions of Returns Manager or Returns Operator in SIMS.net. However, for the purposes of this document, you will need to have the permissions to edit and prepare post 16 data and must have permissions to access Course Manager and Exams Organiser. These users must have permissions of Curricular Manager and exams Officer.
What’s new in this Census/SIMS

QAN and ‘Discount Code’

Recent changes to the way accreditation is recorded has meant that the ‘Qualification Accreditation Number’ (QAN) has been renamed as ‘Qualification Number’ (QN). Similarly, the ‘Discount Code’ has been renamed ‘Subject Classification Code’.

Retakes

Retakes, within SIMS, have been renamed ‘Non-funded’ so as to avoid confusion.

What data is collected?

The following Post 16 information is collected in the School Census Autumn 2017 Return:

- QAN (Qualification Accreditation Number) – now known as Qualification Number (QN)
- Discount Code (AO Discount Code where Result exists, otherwise QWS Discount Code) – now known as Subject Classification Code (SCC)
- Start Date of the Learning Aim
- Planned End Date of the Learning Aim
- Actual End Date of the Learning Aim
- Current Status of the Learning Aim, i.e. Completed, Continuing, Withdrawn, Transferred
- Learning Aim withdrawal reason (for 2017/2018 Learning Aims only, i.e. not 2016/2017), e.g. illness, injury, etc.
- Core Aim (the primary Learning Aim being undertaken in a student's programme of study)
- UK Provider Reference Number for teaching/training provided by anyone other than yourselves.
- Traineeship – an education and training programme
- Maths and English GCSE Prior attainment for each student in year 12 and above for whom Learning Aims are collected.

NOTE: All Learning Aims are collected regardless of their duration, provided the dates are within the collection period, i.e. from 01/08/2016 to 05/10/2017.

Previously, Learning Aims of less than six weeks duration at census day were not collected.

Learning Aims data is collected for students within the following parameters:

- For the Previous Academic Year (2016/2017):
  
  Any student, regardless of age, who has been on-roll between the 01/08/2016 and 31/07/2017 who has participated in a Learning Aim whilst in National Curriculum Year 12 or above.
• In the Current Academic Year (2017/2018):
  Any student, regardless of age, who has been on-roll between the 01/08/2016 and 05/10/2017 (census day) who has participated in a Learning Aim whilst in National Curriculum Year 12 or above.

Dual Registered Students

Funding is only provided to the student's main school and the Learning Aims for dual registered students must be returned by the main school. Subsidiary schools must not submit Learning Aims for dual registered students who are not on-roll at their school.

Two Year Courses

It is important that two year courses are recorded with an appropriate duration in SIMS as part of the course setup. The Learning Aim planned end date should show that the course is expected to last for two years and at the end of year one the Learning Aim status continuing demonstrates that a result is not expected for this student. You will also need to enter Planned Hours (in the Planned Programme of Study), so the total hours should be divided appropriately between the 2 years of the course.

Year Group and Year Taught In

The school census contains Learning Aim data for students in National Curriculum year 12 or above only. When entering or checking student year group information it is important to understand the difference between the two year group fields available within a student’s registration panel shown below:

![Registration Panel]

Year group is the year group that a student is assigned to in the pastoral sense and affects which registration group the student can be assigned to.

Year taught in (YTI) is the year the student is taught in academically. This is the one which is relevant for the census return and for allocating students the appropriate academic classes.

Resits

A resit occurs when an examination is taken again or coursework resubmitted but the student does not attend lessons.

Information on resits is not required or collected as part of the Post-16 funding.
Retakes
Retakes should be treated in the same way as a normal course and recorded as a new learning aim. A retake occurs when a student is retaking a complete qualification, including attendance at regular classes.

Extract from EFA ‘16 to 19 funding: planned hours in study programmes’:

Planned hours and retakes

Planned hours cannot normally be recorded for learning programmes designed to enable students to re-sit or retake examinations and assessments. These are not generally eligible for funding. This is because the institution has already been funded for the study programme including taking exams.

Where there are exceptional circumstances outside the control of the student or institution, such as a period of long term sickness, or good educational reasons, then the retake delivery hours for individual students may be included in the funded study programme hours.

Where a student fails to complete a learning aim in the expected time span and stays on for additional time, including revision sessions or re-sits, no further funding is due. No study hours should be included on the ILR or school census for students repeating learning or retaking examinations. Retakes in English and maths are fundable.

This means that these GCSE English and/or Maths retakes should be included in Planned Hours.

NOTE: In the Summer SIMS Update release, the retake column is being renamed as Non-Funded. Ticking this column for an individual student/s will ensure that if “Calculate hours from courses” is used, the course being retaken will be excluded from Qualification hours and Non Qualification hours.

It is advised that for retakes for Maths and/or English where students have not already achieved a grade C or above, that this column is not ticked. This will ensure that if “Calculate hours from courses” is used, the course being retaken will be included for Qualification hours and Non Qualification hours.
New AS Levels and 2-year A Levels

Both the new two year A-Levels and the corresponding new AS Levels having been allocated different QNs to those allocated to the qualifications they replace.

The new AS Level and the corresponding new two year A-Level can be taught together, but where they are taught together it is the AS Level that should be reported in the Autumn Census as the Learning Aim.

The awarding organisation can design the syllabus for the new AS Level to fit with the new two Year A Level, but they are not obliged to do so.

How is this seen in Course Manager?

**Example A:** Learner starts intending to do only an AS-level. They complete the AS level as planned and do no further study in this subject in year 2

<table>
<thead>
<tr>
<th>Year 1</th>
<th>Year 2</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current system</td>
<td>AS level subject 1</td>
<td></td>
</tr>
<tr>
<td>From 1 Aug 2015</td>
<td>AS level subject 1</td>
<td>No change to current approach</td>
</tr>
</tbody>
</table>

**Example B:** Learner starts intending to do only an AS-level. Following the AS results they decide to take the A level in year 2

<table>
<thead>
<tr>
<th>Year 1</th>
<th>Year 2</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current system</td>
<td>AS level subject 1</td>
<td>A-level subject 1</td>
</tr>
<tr>
<td>From 1 Aug 2015</td>
<td>AS level subject 1</td>
<td>A-level subject 1</td>
</tr>
</tbody>
</table>

**Example C:** Learner starts intending to do only an A-level, and does not enter for the AS level. They complete the A-level as planned

<table>
<thead>
<tr>
<th>Year 1</th>
<th>Year 2</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current System</td>
<td>AS level subject 1</td>
<td>A-level subject 1</td>
</tr>
<tr>
<td>From 1 Aug 2015</td>
<td>A-level subject 1</td>
<td></td>
</tr>
</tbody>
</table>
Example D: Learner starts intending to do both an AS-level and an A level. They complete both learning aims as planned

<table>
<thead>
<tr>
<th></th>
<th>Year 1</th>
<th>Year 2</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current system</td>
<td>AS level subject 1</td>
<td>A-level subject 1</td>
<td></td>
</tr>
<tr>
<td>From 1 Aug 2015</td>
<td>AS level Subject 1</td>
<td>A-level subject 1</td>
<td>No change to current approach</td>
</tr>
</tbody>
</table>

Example E: Learner starts intending to do only an A-level, but during year 1 decides to enter for the AS level as well

<table>
<thead>
<tr>
<th></th>
<th>Year 1</th>
<th>Year 2</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current system</td>
<td>AS level subject 1</td>
<td>A-level subject 1</td>
<td></td>
</tr>
<tr>
<td>From 1 Aug 2015</td>
<td>A-level subject 1</td>
<td>AS level subject 1</td>
<td>The A-level learning aim is closed and transferred to an AS level.</td>
</tr>
</tbody>
</table>

Example F: Learner starts intending to do an AS level, and during year 1 decides to transfer to an A-level and does not sit the AS level

<table>
<thead>
<tr>
<th></th>
<th>Year 1</th>
<th>Year 2</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current system</td>
<td>AS level subject 1</td>
<td>A-level subject 1</td>
<td></td>
</tr>
<tr>
<td>From 1 Aug 2015</td>
<td>AS level subject 1</td>
<td>A-level subject 1</td>
<td>The AS level learning aim is closed and transferred to an A-level.</td>
</tr>
</tbody>
</table>
Example G: Learner starts intending to do only an A-level, and withdraws completely from this subject during year 1

<table>
<thead>
<tr>
<th></th>
<th>Year 1</th>
<th>Year 2</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Current System</strong></td>
<td>AS level subject 1</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>From 1 Aug 2015</strong></td>
<td>A-level subject 1</td>
<td></td>
<td>The A-level learning aim is recorded as withdrawn</td>
</tr>
</tbody>
</table>

Example H: Learner starts intending to do only an A-level, but during year 1 decides to transfer to the AS level. They do not go on to take an A level in this subject

<table>
<thead>
<tr>
<th></th>
<th>Year 1</th>
<th>Year 2</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Current system</strong></td>
<td>AS Level Subject 1</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>From 1 Aug 2015</strong></td>
<td>A-level Subject 1</td>
<td></td>
<td>The A level learning aim is closed and transferred to an AS level. Funding adjustment for prior learning required for AS level for SFA funded learners.</td>
</tr>
</tbody>
</table>
How this document is organised
The next section contains a checklist to prompt you to gather information prior to starting and a suggested order of tasks and checks for you to work through that should enable you to prove that the data you submit for the Autumn Census 2017 accurately reflects the programmes of Study, Learning Aims your students are studying. Remember your funding is based on this data.

There is then a section to enable you to maintain programmes of study with background to Course Manager and information about common processes.

The final section contains information about reports that some schools may find useful when preparing the census. However, the most useful reports for checking Post-16 data are the Learning Aim Detail, Programmes of Study and prior Attainment reports as these show you exactly what data will be written into your census file.
**Preparation**

Gather as much information as you can to help check the information contained within Course Manager. For students in Year 12 and year 13 during academic years 2016/17 and 2017/18:

<table>
<thead>
<tr>
<th>Information required</th>
<th>Where can I get this?</th>
</tr>
</thead>
<tbody>
<tr>
<td>What is the shortest and longest course durations?</td>
<td></td>
</tr>
<tr>
<td>As well as the any New AS or 2-year A Levels are there any other new qualifications being taken (for example Cambridge Technicals)</td>
<td></td>
</tr>
<tr>
<td>Does the timetable accurately reflect Levels taken?</td>
<td></td>
</tr>
<tr>
<td>Are there any courses being studied that are not on the timetable?</td>
<td></td>
</tr>
<tr>
<td>Do you know the planned hours for every Learning Aim started in 2016 and 2017?</td>
<td></td>
</tr>
<tr>
<td>Have planned hours been added to the course screen for 2 year courses? If so, which year do those hours represent?</td>
<td></td>
</tr>
<tr>
<td>Do any courses use providers other than the school to do the main part of the teaching/training? If Yes, you will need their UK Provider Number (UKPRN).</td>
<td></td>
</tr>
<tr>
<td>Do any students attend classes at any other institution? If Yes you will need to know what school, Subject(s), Level(s), Board and QAN and the UKPRN for this institution.</td>
<td></td>
</tr>
<tr>
<td>Are there any changes to exam specifications/Boards for 2017/18? Have any QNs expired?</td>
<td></td>
</tr>
<tr>
<td>Are there any new Learning Aims being taken for the first time in 2017/18?</td>
<td></td>
</tr>
<tr>
<td>Are there any classes leading to two different Learning Aims?</td>
<td></td>
</tr>
<tr>
<td>For students who have withdrawn from a Post 16 course, do you know their withdrawal reason?</td>
<td></td>
</tr>
<tr>
<td>Do all Post 16 students, who were taught in your school prior to studying a Post 16 course, have exam results for English and maths at GCSE level imported?</td>
<td></td>
</tr>
<tr>
<td>For students who arrived at your school after GCSEs, have you got their GCSE maths and English exam results? Have any students got non UK equivalence exam results? Have these been checked?</td>
<td></td>
</tr>
<tr>
<td>Which Post-16 students will continue to study English and/or Maths (to GCSE level)? Are any of them retaking when they already have at least a C grade – (Non-funded)?</td>
<td></td>
</tr>
<tr>
<td>Are any courses linked to a traineeship? If so which courses and which students?</td>
<td></td>
</tr>
</tbody>
</table>
Checking levels set in Nova T6

There is a useful report available in Nova T6 which enables you to check what levels have been applied to all timetabled classes. If you do not have access to Nova T6, you should ask your timetabler to print or export this report for you.

1. **Log into Nova T6** (if you have access), alternatively ask your timetabler to follow the instruction below:
2. Click **Report | Class Summary**
3. Select **Year 12** – select **Both** and tick **Block & Level**.
4. Click OK.

Repeat the steps above to run the report for **Year 13**.

An example of the resulting report is shown below:

The report can be pasted directly into Microsoft Word by clicking the Copy button, opening Word and clicking Paste, or the report can be printed by clicking the Print button.

This report could be useful in checking whether the timetable, and subsequently Course Manager, has the correct levels assigned to each course. You may also need to discuss with the Exams Officer and/or Heads of Subject.
Qualification hours and non-qualification hours.

Please refer to the EFA Funding Guidance for full details of what counts as Qualification and Non-Qualification Hours. [https://www.gov.uk/government/publications/advice-funding-regulations-for-post-16-provision](https://www.gov.uk/government/publications/advice-funding-regulations-for-post-16-provision)

- Qualification Hours are hours that are delivered towards qualifications that are approved for teaching to 16 – 19 year olds under section 96 of the Learning and Skills Act 2000.
- Non-Qualification Hours are hours that do not count towards a qualification on section 96. E.g.: Informal Certificates, Non-qualification activity, Tutorial activity, Work experience, Volunteering/Community activities, Enrichment activities.

Calculating Qualification Hours per Level

Please note: these are examples only and each school will need to base their own calculations on their timetable detail: Length of Periods x number of periods per week (or two week cycle) x number of weeks. See report output on next page that may be useful when calculating the number of hours for your school (instructions on importing this report are below).

For example in a school with a one week cycle it might be:

- **GCEA**
  - 5 one hour periods of teaching per week
  - 30 weeks teaching (up to May half-term)
  - 5 hrs x 30 wks = 150 Qualification Hours
  - 3 GCEA subjects 3x150 = 450 hours

No non-qualification hours for the actual qualification but each student would then need at least 90 non-qualification hours to reach the minimum full time hours of 540.

To enable you to accurately calculate the number of planned qualification hours, two reports exist that show the number of periods per week that each class is allocated on the timetable. These reports are available to download with this document. The report for downloading is called Lesson Information Year 12 & 13.RptDef. This report holds both the Year 12 and the Year 13 reports. Once you have downloaded the report outlined above, you need to import into Sims using the route Reports | Import

Once imported, the reports can be run using Reports | Run Report. Both reports can be found in the Focus folder. Expand this folder and then open the Class folder. The two reports can be found here and are named Northants: Lessons for year 12 2017-18 and Northants: Lessons for year 13 2017-18.
Examples of the output of the Lesson information for Year 12 for different cycles are shown below:

### One week cycle

<table>
<thead>
<tr>
<th>Class</th>
<th>Subject</th>
<th>Students</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>12D/Art</td>
<td>Art</td>
<td>17</td>
<td>5</td>
</tr>
<tr>
<td>12B/Bt</td>
<td>Biology</td>
<td>17</td>
<td>5</td>
</tr>
<tr>
<td>12B/Bs1</td>
<td>Business Studies</td>
<td>17</td>
<td>5</td>
</tr>
<tr>
<td>12D/Bs1</td>
<td>Business Studies</td>
<td>15</td>
<td>5</td>
</tr>
<tr>
<td>12A/Ch1</td>
<td>Chemistry</td>
<td>12</td>
<td>5</td>
</tr>
<tr>
<td>12A/Grt1</td>
<td>Construction</td>
<td>11</td>
<td>15</td>
</tr>
<tr>
<td>12C/Gc1</td>
<td>Economics</td>
<td>15</td>
<td>5</td>
</tr>
<tr>
<td>12a/En1</td>
<td>English</td>
<td>10</td>
<td>2</td>
</tr>
<tr>
<td>12D/En1</td>
<td>English</td>
<td>17</td>
<td>5</td>
</tr>
<tr>
<td>12x/Ft1</td>
<td>Food Tech</td>
<td>11</td>
<td>5</td>
</tr>
<tr>
<td>12B/Ft1</td>
<td>French</td>
<td>16</td>
<td>5</td>
</tr>
<tr>
<td>12G/Gt1</td>
<td>General Studies</td>
<td>21</td>
<td>1</td>
</tr>
<tr>
<td>12G/Gt2</td>
<td>General Studies</td>
<td>21</td>
<td>1</td>
</tr>
<tr>
<td>12G/Gt3</td>
<td>General Studies</td>
<td>19</td>
<td>1</td>
</tr>
<tr>
<td>12G/Gt4</td>
<td>General Studies</td>
<td>19</td>
<td>1</td>
</tr>
<tr>
<td>12A/Ggt1</td>
<td>Geography</td>
<td>12</td>
<td>5</td>
</tr>
<tr>
<td>12C/Gc1</td>
<td>German</td>
<td>17</td>
<td>5</td>
</tr>
<tr>
<td>12D/Hs1</td>
<td>Health &amp; Social</td>
<td>15</td>
<td>5</td>
</tr>
<tr>
<td>12D/Hs1</td>
<td>Health &amp; Social</td>
<td>16</td>
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</tr>
<tr>
<td>12C/Ht1</td>
<td>History</td>
<td>17</td>
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<tr>
<td>12A/Lt1</td>
<td>Land Based Studies</td>
<td>11</td>
<td>15</td>
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<td>12C/Lt1</td>
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<tr>
<td>12B/Mt1</td>
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<tr>
<td>12D/Mt1</td>
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<td>5</td>
</tr>
<tr>
<td>12A/Pt1</td>
<td>Physical Ed</td>
<td>12</td>
<td>5</td>
</tr>
<tr>
<td>12C/Pt1</td>
<td>Physics</td>
<td>15</td>
<td>5</td>
</tr>
<tr>
<td>12A/Pt1</td>
<td>Product Design</td>
<td>11</td>
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</tr>
</tbody>
</table>

### Two week cycle

<table>
<thead>
<tr>
<th>Class</th>
<th>Subject</th>
<th>Students</th>
<th>Count</th>
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</thead>
<tbody>
<tr>
<td>12O/Art</td>
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<td>21</td>
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</tr>
<tr>
<td>12B/Bt</td>
<td>Biology</td>
<td>9</td>
<td>9</td>
</tr>
<tr>
<td>12B/Bs1</td>
<td>Business Studies</td>
<td>22</td>
<td>9</td>
</tr>
<tr>
<td>12D/Bs1</td>
<td>Business Studies</td>
<td>18</td>
<td>9</td>
</tr>
<tr>
<td>12A/Ch1</td>
<td>Chemistry</td>
<td>9</td>
<td>9</td>
</tr>
<tr>
<td>12A/Cn1</td>
<td>Construction</td>
<td>8</td>
<td>25</td>
</tr>
<tr>
<td>12C/Cn1</td>
<td>Economics</td>
<td>15</td>
<td>9</td>
</tr>
<tr>
<td>12a/Fn1</td>
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<td>English</td>
<td>19</td>
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<tr>
<td>12A/Ft1</td>
<td>Food Tech</td>
<td>6</td>
<td>9</td>
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<tr>
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<td>7</td>
<td>9</td>
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<tr>
<td>12G/Gt1</td>
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</tr>
<tr>
<td>12G/Gt2</td>
<td>General Studies</td>
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<td>12G/Gt3</td>
<td>General Studies</td>
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</tr>
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<td>19</td>
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</tr>
<tr>
<td>12D/Hs1</td>
<td>Health &amp; Social</td>
<td>18</td>
<td>9</td>
</tr>
<tr>
<td>12C/Ht1</td>
<td>History</td>
<td>12</td>
<td>9</td>
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<td>12A/Lt1</td>
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<td>12C/Lt1</td>
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<td>Mathematics</td>
<td>16</td>
<td>4</td>
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<td>12B/Mt1</td>
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<tr>
<td>12A/Pt1</td>
<td>Product Design</td>
<td>7</td>
<td>9</td>
</tr>
</tbody>
</table>
Preparing Post 16 data for the Autumn 2017 School Census

**Post-16 Data Checklist – Autumn Census 2017**

<table>
<thead>
<tr>
<th><strong>Upgrade to the SIMS 2017 Summer Release</strong></th>
</tr>
</thead>
<tbody>
<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>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Ensure that English and Maths GCSE Prior Attainment (grade achieved) is recorded for each student in year 12 and above. See page 15 for further help.</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Exams officers can add external results into SIMS. See page for further help.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Check Course Manager Settings are set appropriately. See page 18 for further help.</strong></th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th><strong>Check that Leavers have all been recorded and update course memberships. See page 25 for further help.</strong></th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th><strong>Import the latest QWS QN catalogue. See page 34 for further help.</strong></th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th><strong>Check all courses are present. This may include courses for non qualifications i.e. Study, Work Experience etc. See page 38 for further help.</strong></th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th><strong>Check course duration for individual courses. See page 39 for further help.</strong></th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th><strong>Check the Planned Qualification and Non Qualification hours for Individual Post-16 Courses are entered and correct, if appropriate. See page 39 for further help.</strong></th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th><strong>Check the QWS QN code for all appropriate Post-16 Courses are present and correct. See page 40 for further help.</strong></th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th><strong>Check the student membership for each Post-16 course and check that the Individual course membership status is correct, e.g. Withdrawn and Transferred. Check that Learning Aim withdrawal reason has been recorded for those students leaving a learning aim or for those students who have left the school. See page 41 for further help.</strong></th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th><strong>Check that the appropriate exam awards have been linked to the course.</strong></th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th><strong>Check that Examination Results are displayed in the Learning Aims Panel where appropriate. This should include non EDI Exam Results. You may need to liaise with your Exams Officer.</strong></th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th><strong>Check that there is only one award associated with each course. See page 43 for further help.</strong></th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th><strong>Check that student membership to two year courses have been dealt with correctly. See page 45 for further help.</strong></th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th><strong>Check the Individual Programme Study Hours (Qualification and non Qualification Hours) for all post-16 students have been entered for the academic year 2016/2017 and 2017/2018. See page 47 for further help.</strong></th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th><strong>Check that the Core Learning Aim has been set for students, where applicable. See page 49 for further help.</strong></th>
</tr>
</thead>
</table>
Check that employment information for Post-16 students has been added, where applicable. See page 53 for further help.

Ensure that the UKPRN (UK Provider Reference Number) is entered for each Learning Aim where applicable. See page 27 for further help.

Ensure that any student/course that is part of a traineeship programme has an indicator. See page 41 for further details.

Carefully check all Census reports relating to Post-16. See page 5 for further help.
**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.

---

**Preparing Data for the Previous Academic Year**

**Updating Prior Attainment**

The **prior attainment** (i.e. highest grade achieved) for Maths and English GCSE should be recorded for each student who are/were in year 12 and above between 01/08/2016 and 05/10/2017. This data is used to fund schools and therefore it is important that the information is recorded accurately.

**Qualifications equivalent to GCSE grade 9 to 4 or A* to C in maths and English for the purposes of prior attainment**

The following qualifications in maths, English language and literature are treated as equivalent to GCSE grade 9 to 4 or A* to C. Students who have studied in England or elsewhere in the United Kingdom (Wales, Scotland or N Ireland) holding the following qualifications will not be required to study maths and/or English to meet the condition of funding:

- international GCSEs, regulated or unregulated, or equivalent level 1/level 2 certificates grade A* to C/9 to 4
- GCSEs grade A* to C obtained in Wales
- GCSEs grade A* to C obtained in Northern Ireland
- Scottish Intermediate 2 certificates grade A to C
Preparing Post 16 data for the Autumn 2017 School Census

- Scottish Standard Grades (credit level) grade 1 to 2
- Scottish National 5 certificates grade A to C
- international O levels grade A* to C
- A and AS levels at any pass grade
- full International Baccalaureate (IB) level 3 Diploma (LARS reference 50034157)
- International Baccalaureate Certificate in maths
- core maths qualifications at level 3


1. Select **Tools | Statutory Return Tools | Update Prior Attainment** to display the **Update Prior Attainment** page.

   The **Populate from Exams** option is available for users who want to populate the **Prior Attainment** panel with data from Examinations Organiser. Where the data is not available in Examinations Organiser, i.e. the information has not been recorded in Examinations Organiser, the data can be entered manually.

2. Click the **Populate from Exams** button to display the following message:

   **Example scenario:**

   *The Populate from Exams button is clicked to populate the Prior Attainment grid with data from Examinations Organiser.*

   *Any missing data is entered manually.*

   *When the Populate from Exams button is clicked again, the data originally drawn from Examinations Organiser is overwritten, even if it has been edited. Manually entered data (not recorded in Examinations Organiser) is preserved.*

3. Click the **Yes** button to populate the **Prior Attainment** grid.
4. Enter or edit the prior attainment data, if required.
   a. Click in the required cell in the **Maths Highest Grade** column and then select the applicable grade from the drop-down list.
   b. Click in the required cell in the **Maths Prior Attainment** column and then select the applicable attainment description from the drop-down list.
   
   Repeat steps a and b for the **English Highest Grade** and **English Prior Attainment** columns.
   
   c. Continue to edit the content of the **Prior Attainment** grid, as required.

5. Ensure that the **Maths Funding Exemption** value (No exemption displayed by default) is correct for each record. This value must be selected manually.

6. Click in the required cell in the **Maths Funding Exemption** column and then select the applicable value from the drop-down list:
   - **Learning disability** (a learning disability prevents the student from studying for the qualification(s))
   - **Overseas equivalent** (a recognised overseas equivalent qualification is held by the student)
   - **UK equivalent** (the learner has met the GCSE condition of funding they hold an approved equivalent UK qualification)
   - **No exemption**.

7. Click the **Save** button.

**Please note:** When students have achieved UK or overseas qualifications in maths and/or English, they must hold these qualifications at a level equivalent to GCSE A*-C / 9-4. If they have not achieved at this level, they must study for a valid maths / English qualification to meet the condition.

Where a student has achieved an **equivalent overseas** maths / English qualification to A*-C / 9-4, then the recording codes would be:

- Prior attainment ‘NR – Not Required’
- Year group achieved would either be **achieved at the end of year 11** or **achieved after year 11**
- Funding exemption ‘**Overseas Equivalent**’

Where a student has achieved an **equivalent UK** maths / English qualification (for example, **Scottish standard grades**) to A*-C / 9-4, then the recording codes would be:
• Prior attainment ‘NR – Not Required’
• Year group achieved would either be achieved at the end of year 11 or achieved after year 11
• Funding exemption ‘UK equivalent’

Checking Course Manager Settings

The Update Course Manager Settings page enables you to specify the default settings that will be used throughout Course Manager. These settings are applied to all courses unless you manually modify the parameters of a specific course from the Course Details page (Tools | Academic Management | Course Manager | Maintain Course).

Select Tools | Academic Management | Course Manager | Course Manager Settings to display the Update Course Manager Settings page.

![Update Course Manager Settings](image)

Checking the Default for Course Browse

Select Tools | Academic Management | Course Manager | Course Manager Settings to display the Update Course Manager Settings page.

Ensure that Census View is displayed in the Default for Course Browse field. Select from the drop-down list, if necessary. The From and To dates are updated automatically in conjunction with the selection that you have made.
When you **Search** for courses in the **Find Course** browser (**Tools | Academic Management | Course Manager | Maintain Course**), only courses that have student memberships during this date range are displayed.

**Note:** However, when searching for courses in **Tools | Academic Management | Course Manager | Maintain Course** it may also be useful to use the **Current Academic Year** and **Previous Academic Year** filters (ensuring your academic year is set to 2016/2017) so that you can check information for the single academic years.

### Checking Default Course Durations

The **Minimum** and **Maximum Course Duration** fields enable you to define the predicted length of time needed to deliver the course material to the pupil/students. The **Minimum Course Duration** defaults to One Year, the **Maximum Course Duration** defaults to Two Years. Both of these options can be changed to ensure that the expected course duration does not exceed the length of time specified here. The possible lengths of time that you can select for either of these duration settings are: Less than 2 weeks, 2-24 Weeks, One Year, Two Years, Three Years, Four Years or Five Years.

The **Default Course Duration** cannot be outside the range defined by the **Minimum** and **Maximum Duration** fields. This is set to One Year, by default. Specifying the **Course Duration** makes it easier for you to decide whether to restart a course after the Summer holidays as a continuation of the same Learning Aim or to regard the course as a retake with a new Learning Aim associated with it.

The settings specified here are applied to all courses globally. However, you can modify the **Course Duration** for a specific level of courses shown later in this chapter or within an individual course via **Tools | Academic Management | Course Manager | Maintain Course**, if required, also discussed later.

### Checking Discount Results Selection

The **Discount Results** check box is selected by default. This ensures that the exam results calculation includes discounting and means that you do not need to edit exam results manually when creating the School Census return.

### Checking Planned Hours Threshold

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Preparing Post 16 data for the Autumn 2017 School Census

Planned hours are defined before the start of the academic year and should not be changed even if details change. To qualify for funding, Planned Hours must be timetabled within your school’s normal working pattern.

Enter the number that represents the upper limit of planned hours in the Planned Hours Threshold field e.g. 540. This will assist with highlighting those students that have not reached the threshold hours in the Programme of Study screen discussed later in this document.

Checking the Earliest Year Taught In for Completion Management

Select Tools | Academic Management | Course Manager | Course Manager Settings to display the Update Course Manager Settings page.

The Earliest YTI for Completion Management field defaults to Curriculum Year 11. This indicates that students taught in Year 11 and above are subject to management of their course completion.

It is advisable to leave the earliest YTI set to Curriculum Year 11 (or no higher than 11) because students who are taught in Year 11 and above, are subject to monitoring of their course memberships and course memberships for students who are taught in Year 12 and above, have a direct impact on school funding as reported in the School Census.

IMPORTANT NOTE: Courses for students in Year 11 must be ended before the 1 August so that they are not confused with qualifications for Year 12 and above.

Checking Default Completion and Continuity Tolerance

Select Tools | Academic Management | Course Manager | Course Manager Settings to display the Update Course Manager Settings page.

The Default Completion Tolerance field defaults to Two Months. The length of time specified here indicates the period of time prior to the expected course completion date that a student can leave a course and still be deemed to have completed the course. For example: If a student completes the course and examinations in June, which is before the Planned End Date at the end of July, this is within the Completion Tolerance of two months. Therefore, the completion status is set to Completed.

A default Status is assigned via Curriculum Assignment by Scheme or via the Leavers routine, when a student leaves a course.

The Default Continuity Tolerance field defaults to Two Weeks. This represents the acceptable length of a ‘gap’ in course membership, including holidays, which is tolerated before course memberships are deemed to have been discontinued.
For example: If the 'gap' is within Continuity Tolerance, the course memberships are joined up so that there is no break in membership.

If you wish to change either of the default values, click the applicable down arrow then select from the drop-down list.

The specified Continuity Tolerance and Continuity Tolerance values are applied globally to all courses but can be modified for individual courses on the Course Details page (Tools | Academic Management | Course Manager | Maintain Course), if required.

Checking the Default Course Duration, Tolerances and Qualification & Non Qualification Hours by Level

This screen allows you to set the completion and continuity setting by level. It is also possible to add in the planned qualification and non qualification hours by level. Adding the hours here should ease the process of entering these hours for all Post-16 students as the hours can then be calculated from the courses. Further information is available on the Programme Study Hours screen in Chapter 3.

A student must be on a course for a minimum of six weeks to be included in the School Census.

The Default Course Duration and Tolerances by Level grid displays the default settings for all the available Levels.

Edits can be made to settings for individual levels, if required.

1. Click the applicable cell in the Default Course Duration, Default Continuity Tolerance or Default Completion Tolerance column then select an alternative setting from the drop-down list.
2. To reset the level settings back to the default setting, right-click the applicable column heading then click the Set Default as option.

**IMPORTANT NOTE:** If you want to collectively change the default setting in the Default Course Duration, Default Continuity Tolerance or Default Completion Tolerance column, you must right-click the applicable column heading before saving the data.
If you click the **Save** button before setting the defaults, the **Default Course Duration and Tolerances by Level** panel will not correctly reflect the defaults specified in the **Settings** panel.

3. Click the applicable cell in the **Default Qualification Hour** or **Default Non-Qualification Hours** column then enter the required number.

When new Levels are added, you are prompted to revisit the default settings to ensure that they are applicable to the new Levels.

It is also suggested that you manually set the **Default Course Duration** for GCSEs to **Two Years** in length, i.e. for Years 10 and 11, and then change individual Post 16 courses to 1 year, as appropriate, e.g. Maths GCSE for 6th form is 1 year.

4. Click the **Save** button to apply your changes.

**Starting Next Year’s Timetable Early**

If you start next year’s curriculum early in your school, this will have an impact on class and course memberships. If this year’s student scheme memberships finish at the end of the Summer term, they need to be terminated at the date that the new timetable begins. This should be done to prevent old, as well as new students from appearing in class lists.

Schemes exist for the whole academic year, even if classes and student class memberships within the scheme have end dates before the end of the academic year, unless it was anticipated during the Summer of 2016 that schemes would finish earlier. If it was not anticipated that the 2016/2017 timetable would finish early and existing memberships need to be adjusted, this should be done before making the new assignments.

Where you want to show students as being in next year’s classes, i.e. Year 12 students in Year 13 classes, you should consider the following:

- Class and course memberships for 2016/2017 should finish on the correct date.
- The curriculum plan and timetable should be transferred from Nova for the next academic year.
- Students should be assigned to classes and courses for June/July.

If an early commencement of the next year’s timetable results in an early start to courses, the affected courses should be recorded as such in Course Manager. This ensures that the Learning Aims are collected accurately in the School Census.

**NOTE:** Learning Aims are collected from 01/08/2016 to 05/10/2017.

For example: If Year 11 students finish their exams early then they start their Year 12 course 1 June and continue the course in September, the course will last more than 12 months. It is possible to record the period from the start of the course (in this example June) to the start of the new academic year (September) as an **Introductory Session** with a level of **Other**.

Information regarding financial schemes in England to support 16 to 19 year olds can be found on the GOV.UK Website ([https://www.gov.uk/government/collections/funding-education-for-16-to-19-year-olds](https://www.gov.uk/government/collections/funding-education-for-16-to-19-year-olds)).
Running the Bulk Update Courses Routines (Only required if End dates are incorrect or Status need resetting)

Please read carefully and completely before undertaking.

Select Tools | Academic Management | Course Manager | Bulk Update Courses to display the Bulk Update Courses page. This page is separated into two routines:

- Remove August or September End Dates
- Use Completion Tolerance to Reset Status

Both of these routines enable you to retrospectively correct historical data that may have been defined incorrectly.

Before running either Bulk Update routine, it is suggested that you click the associated Report button to view an html report detailing the classes that will be corrected and the changes that will be made.

Running the Remove August End Dates Routine

If schools in England have inadvertently set the end date for classes to a date in August or September, this incorrect date becomes the membership planned end date for courses. This will generate errors in the School Census return. To prevent this becoming an annual problem that requires manual intervention, it is possible to run the Remove August or September End Dates bulk update routine to change the dates to 31 July.

Running the Remove August or September End Dates routine performs the following actions within the parameters of If Start Date is before August and Planned End Date is in August or September:

- Set Planned End Date to 31st July
- If Actual End Date exists set to 31st July
- Adjusts class end dates in line
- If a Status exists, remove it
- Reports on the changes made.

Click the Execute button to run the routine and update the classes.
Running the Using Completion Tolerance to Reset Status Routine

Running the **Use Completion Tolerance to Reset Status** routine performs the following actions:

- Set Planned End Date to Actual End Date
- Adjusts class end dates in line
- If a Status exists, remove it
- Reports on the changes made.

Click the **Execute** button to run the routine and update the status for classes.
Recording Leavers and Updating Course Memberships

The facility to record leavers enables accurate records to be kept of students after they have left the school. Applicable students, e.g. Year 13, should be marked as leavers as part of the end of year routine.

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

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

To allow the automatic procedures to help you with course completion information for Post 16 students, it is necessary to consider when to make use of the Leavers routine. Some schools will have left the course completion date as the default date when all classes finish. Such a date is not correct for many Post 16 students who will finish the course and leave the school some weeks before the rest of the school finishes for the year. If you make use of the Leavers routine in advance of the students actually leaving, SIMS deals with this problem for you.

The end date for the course will be set in line with this ‘expected’ leaving date and when the School Census is run, the courses will be interpreted as having been completed.

If the Leavers routine is run after the students have actually left, and the course end date was in the future, SIMS updates course membership in accordance with the Completion Tolerance, e.g. if the student's leaving date and the course end date are within the Completion Tolerance, SIMS entered a status of complete.

Update Course Memberships should be run (via Tools | Academic Management | Course Manager | Update Course Memberships) before moving the system to the new academic year and should be run again after moving to the new academic year, once class information is in place. Update Course Membership is an Academic Management routine and like other routines in this area, it is academic year based. If you forget to run Update Course Memberships before moving to the new year, you can easily solve the problem by going back to the old year and running Update Course Membership.

Similarly, if you forget to run Update Course Memberships, as soon as class information is in place, you can run it in the new academic year. However, you should be aware that course membership is much like other group membership, and courses are set active or inactive at the start of the day, depending on what membership they have at the start of the day.

So, if you do not run Update Course Memberships until the actual day of the census, the courses will remain set to inactive until the next day. Active and inactive is only a display parameter, but it could cause unnecessary confusion on census day.

To ensure that information required for the School Census is accurate and up-to-date, it is recommended that you check that all leavers have at least the minimum statutory information recorded before making them a leaver, e.g. ethnicity, first language, etc.
Recoding Leavers

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

![Find Student(s) browser](image)

2. Search for the required student then double-click their name to display the **Manage Student(s) Leaving Details** page.
   - If you want to assign the status of **Leaver** to a group of students at once, specify their **Year Group** or **Reg Group** then click the **Search** button. Highlight the required student names by using the **Ctrl**, **Shift**, and **Down Arrow** keys then click the **Select** button. This populates the **Students** panel with the selected students’ names.
   - If you wish to assign the status of **Leaver** to all the students at once, click the down-arrow on the **Select** button and choose **All**. This populates the **Students** panel with all the students’ names.

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

<table>
<thead>
<tr>
<th>Current (2016/2017) Year Group</th>
<th>Circumstance</th>
<th>Date of Leaving</th>
</tr>
</thead>
<tbody>
<tr>
<td>Year 12</td>
<td>Students not returning to Sixth Form.</td>
<td>Issue a DOL which is after the student has completed all of their courses. This date MUST be on or before the 31/07/2017.</td>
</tr>
<tr>
<td>Year 13</td>
<td>Student not returning to school.</td>
<td>Students should be issued a DOL which is after all of the courses have been completed. This date MUST be on or before the 31/07/2017.</td>
</tr>
</tbody>
</table>

4. Select the **Reason for leaving** from the drop-down list, such as **Normal leaving age - Higher education institutions**.
5. Enter the **Destination after Leaving**, if known.
6. Select the Learning Aim Withdrawal Reason from the drop-down list, e.g. **Other Provider**
7. Click the **Assign to Selected** button.
8. If an error has been made, highlight the student, correct the information in the **Leaving Information** panel then click the **Assign to Selected** button.
9. To remove a student from the list, highlight their name then click the **Remove** button.
10. Click the **Save** button to save the changes.

11. Click **Yes** and the selected students are recorded with a date of leaving on the date specified.

**Note:** Issuing dates of leaving **WILL NOT** have an impact on Exam Results due in August 2016.

**UKPRN Set Up**

UKPRNs are only required for externally provided courses. Courses provided by the school itself (that is, taught in house by the school's own staff) must not have the school's own UKPRN added.

In order for schools to attach UKPRNs to where the learning is provided other than by the school, provider UKPRNs must be added as a course classification before they can be used by Course Manager. UKPRNs can be found at [https://www.ukrlp.co.uk](https://www.ukrlp.co.uk)

There is no need to register for this site and anybody can access it.
Enter as much detail as you know and click **Search**.

The information required in SIMS is the **Provider name** and **Reference Number**.

**Adding UKPRNs into SIMS**

1. Select **Tools | Academic Management | Course Manager | Maintain Course Classifications.**
2. Select **Provider UKPRN** from Classification Codeset.
3. Click New. In Code enter the Reference Number, in Description enter the name of the provider, and then click OK.

4. Repeat step 3 above for any further providers.
5. Click Save to save changes.
You do **not** need to add your own centre UKPRN **unless** there is a course where some students are taught mainly by one provider and others are taught mainly by your own centre.

6. Click **OK** to close the classification window.

7. Click **OK** at the message screen and then log out of Sims and back in again.
Adding the UKPRN to a course

1. Select Tools | Academic Management | Course Manager | Maintain Course.
2. Double-click the course to open the detail, and then click tab 4: Classification.

There may/may not be a QAN code already assigned. Adding or amending a code is covered later in this guide.

3. Click New.

4. Select Provider UKPRN from the Codeset list, and then highlight the required provider.
5. Click **OK** to add the **UKPRN** to the course.

6. Click **Save** to save the details.

There is no need to do anything else unless a course is split in such a way that some students are taught by one provider and others are taught either by yourself or a different provider. These options need to be changed at membership level in panel 7. The default provider (your own school or the provider added to panel 4) should appear as a blank in panel 7.

For most courses the default will be your own centre and you will need to do nothing. However, occasionally you may have two classes studying a course, one taught by one provider and the other taught by another. Only one UKPRN can be added to the classification panel, panel 4.

For the students who are not taught by this provider, you must manually amend panel 7 to the UK provider they did have. This might, of course, be your own school. As long as the UKPRN details have been added to the classifications, using **Tools | Academic Management | Course Manager | Maintain Course Classifications** you will be able to see the other provider in the drop down menu.
Preparing Post 16 data for the Autumn 2017 School Census

The above graphic shows class 13B/Bs1 as being taught by the school. Class 13D/Bs1 will be taught by the default provider (which was set earlier as Capita Learning) and so a UKPRN has been setup and can be added manually to each child in class 13B/Bs1.
Preparing Post 16 data for the Autumn 2017 School Census

Updating Course Memberships
When the Update Course Memberships routine is run outside the Completion Tolerance, if SIMS detects that a course membership is terminating prematurely, the original end date is displayed in the P End Date (planned end date) column in the Members panel on the Course Details page. The completion Status is not populated automatically, because it will not be possible to determine whether the termination should be regarded as withdrawn or transferred. The completion Status must be selected manually. A yellow background indicates that a value has been omitted. When School Census is run, a validation error is generated if the value is missing.

This routine should always be run when any changes to class memberships are made.

Ensure you are in the appropriate academic year via Tools | Academic Management | Set Academic Year.

1. Select Tools | Academic Management | Course Manager | Update Course memberships to display the following message:
2. Update course membership can take a long time. Do you wish to proceed?
3. Click the Yes button to start the Update Course Membership routine.

Note: The Update Course Memberships routine is academic year specific. As the Autumn Census spans two academic years it may be useful to ensure that Update Course Memberships is run for the 2016/2017 Academic year as well as the 2017/2018 Academic year.

Importing Catalogue Files
The DfE Qualification Data catalogue should be imported. It is recommended that the catalogue is downloaded from the DfE QAN website: (https://collectdata.education.gov.uk/qwsweb/default.aspx) and imported into SIMS in September (when the courses are being set up) and before starting the School Census Autumn 2017 Return (05/10/2017).

The qualification data is applicable to all Learning Aims without a result or basedata supplied by the exam Awarding Organisation or Body including new courses and completed school assessed Learning Aims.

1. Download the latest QWS data files from the DfE QAN web site to a folder of your choice. The four files that need to be downloaded are:
   - Current_QAN.xml
   - Discount_Codes. xml
   - Awarding_Bodies. xml
   - Qualification_Type.xml
2. In SIMS, select Tools | Examinations | Import Qualification Data. A confirmation dialog is displayed.
3. Click the OK button to confirm that the downloaded data you are about to import is up-to-date.
4. The **Import Qualification Data** page is displayed.
5. In the **Select Catalogue Files** panel, click the **Browser** button adjacent to each file name field then navigate to the stored location of the applicable file.
6. Select the required XML file then click the **Open** button to return to the select **Select Catalogue Files** panel where the selected file name is displayed.

![Select Catalogue Files](image)

7. Click the **Import Catalogue Files** button.

Provided that you have selected the correct file name for each file type, the files are automatically imported in the correct order. **This may take some time.**

When the files have imported successfully, an **Activity Log** is displayed confirming which files have been imported.

![Activity Log](image)

8. Click the **Close** button to return to the **Import Qualification Data** page.
9. You can click the **Print** button to print a copy of the file names and locations for future reference.
When you next open the **Import Qualification Data** page, the **Last Updated On** field displays the date of the most recent import. The example below shows that the last update was dated 18th August.
Activating QWS QNs for use in Course Manager

Even though the entire QWS QN catalogue has been downloaded and imported, only a small selection of QWS QN codes need to be present for selection within Course Manager. If a code is required within Course Manager and it is not present, it is necessary to make it available for selection by activating the QWS QN from the imported catalogue into SIMS.

1. Select Tools | Statutory Return Tools | Update QANs and Discount Codes for Course Manager.

   A selection screen is displayed supplying various filters.

   ![Selection Screen](image)

   The QAN catalogue contains thousands of records and clicking the Search Title button would load the entire list for browsing, which may take some time due to the amount of data. Awarding body, level of the qualification and title contents can all be used in combination to narrow the search.

2. Use the filters to locate the appropriate QAN.

   ![Select Code](image)
Preparing Post 16 data for the Autumn 2017 School Census

3. Click to highlight the QAN and then click the Add button to move the selection into the lower field.

**NOTE:** If a classification is already active in Course Manager it cannot be located in the catalogue. This can be checked via Tools / Academic Management / Course Manager / Maintain Course Classification.

4. Click Update to save the addition(s). The screen can then be closed.

The QN will now be available to attach to the course via Tools | Academic Management | Maintain Course. The QWS QN should be attached via the Classification panel of a course. See QWS QN Code

**Checking All Courses**

It is vital, for the purposes of funding, that all courses that you offer for post-16 students are available in SIMS to ensure that the correct Learning Aim information is available for the School Census return.

You may also wish to consider ensuring courses are available for non qualification courses post-16 students have been, or will be partaking in. This can assist in the calculation of the non qualification hours for students (covered later in this document).

Work Experience forms part of these non qualification hours and QWS QAN codes are available in order to link to these courses.

It may be useful to have a list of all the course/qualifications you offer to your post-16 students for each academic year to use as a cross-checking resource against the courses you have available in SIMS.

1. Use the route Tools | Academic Management | Set Academic Year. Ensure the Academic Year 2016/2017 is selected.
2. Use the route **Tools | Academic Management | Course Manager | Maintain Course.**
3. Change the **View Memberships** filter to *Previous Academic Year.*
4. Click **Search.**

This will show all the courses with active membership the previous academic year. Ensure that all of the courses which post-16 students have membership to, are available.

You may want to use the **Levels** filter to assist with this process but ensure you don’t exclude courses which may have been set up with an unknown/incorrect level.

Any missing courses will need to be created.

Once completed repeat this process for the **2017/2018** Academic year.

**Note:** While you are checking the courses exist per academic year you may also want to check the Duration, QWS QN, Planned Hours, Memberships and Exam Award Links and Exam results (if appropriate) shown below, as you go.

### Check course duration for individual courses

As previously discussed in this document you can set the default course duration for all courses or specify a course duration by level via **Tools | Academic Management | Course Manager | Course Manager Settings** e.g. GCSE set as a two years.

Alternatively, you can set the duration at individual course level.

1. Use the route **Tools | Academic Management | Course Manager | Maintain Course.**
2. Locate and open the appropriate course.
3. In **Panel 1: Duration and Tolerance** ensure the duration is set accordingly. This ensures that the software deals with continuation and retakes appropriately when membership to the same course is found over multiple academic years.

### Check the Planned Qualification and Non Qualification Hours

As discussed earlier in the document the Planned Hours for a course can be entered by Level e.g. GCE Advanced Subsidiary (GCAS1 – the NEW AS level). This would filter through to all courses of that level. If any courses do not meet the default hours then the hours can be edited/entered for individual courses.

This will assist if schools wish to calculate the Study Programme Hours (Qualification and Non Qualification hours) from Courses. Further information on this can be found later in this document.

1. Use the route **Tools | Academic Management | Course Manager | Maintain Course.**
2. Locate and open the appropriate course.
3. Ensure the **Qualification** or **Non Qualification Hours per Year** are entered accordingly.

**Note:** Tuition Hours, Study Hours and Minutes per cycle **DO NOT** need to be completed.
Check the QWS QN Code is present and correct

It is good practice that all qualification hour courses have the QWS QN available and essential for all new 2017/2018 courses where results are not yet available. This is also a consideration for Courses for Work Experience.

1. Use the route Tools | Academic Management | Course Manager | Maintain Course.
2. Enter any filtering criteria and click Search.

![Course Management Screen](image)

The QWS QAN is visible from the browse window without the need to open the details of the course.

The expiry of the QAN is also visible from the browse window.

3. Check the QAN is present, not expired and correct.

It can be clearly seen in the screenshot above that four of the maths courses do not have QN codes, whilst one expired at the end of August 2017. All of these courses will need to have QN codes with the exception of the key stage 3 mathematics course.

4. Double click on a course to open it and scroll to Panel 4. Classification.

![Classification Panel](image)

5. Click New. Then choose QAN and enter sufficient information to find the correct QN code, before highlighting the appropriate QN and clicking Go.
6. Click **Save** to keep the changes.

![Image of course management interface]

**Check Student Membership and Membership Status e.g. Withdrawn or Transferred**

As student membership to courses impacts on funding it is not only important to check that the courses exist but also that the membership to the courses is correct.

Retention of students on courses is also a factor for funding so it is imperative that you accurately record withdrawals and transfers from courses for the previous academic year 2016/2017. Any fluctuation of student membership to new courses for 2017/2018 prior to the School Census date is not collected.

Membership to the courses can either be checked in each course via **Tools | Academic Management | Course Manager | Maintain Course** or via **Tools | Academic Management | Course Manager | Student Courses Report**. This route may be useful as you can filter the students by Course Status i.e. Withdrawn and transferred.

1. Use the route **Tools | Academic Management | Course Manager | Maintain Course**.
2. Locate and **open** the appropriate course.
3. In **Panel 6: Classes** check the classes linked to the course.
4. In **Panel 7: Memberships and Results** check the student membership to the course.

Also check that students that have withdrawn or transferred from courses have the appropriate status in the **Status Column**. This may be highlighted in yellow if the student has been removed from the class attached to the course to signify missing information.

5. Select the withdrawal **Reason** from the drop-down list to record why the student is leaving the course or learning aim before the expected end date.

**Note:** The Memberships and Results panel can be ordered by any of the columns by clicking into the grey header of the column.

**Indicating Traineeships**

A traineeship is an education and training programme with work experience. 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.

In preparation for the School Census Autumn 2017 Return, ensure that traineeships are indicated, where applicable.

1. Select **Tools | Academic Management | Course Manager | Maintain Course** to display the **Find Course** browser.
2. Search for then select the required course to display the **Course Details** page.
3. Click the **Memberships and Results** hyperlink to display the **Memberships and Results** panel.

   This panel displays the details of all student memberships for the selected course.

   ![Memberships and Results panel](image)

   If a student is participating in a traineeship programme, ensure that this is indicated by clicking the **Traineeship** column (located on the right-hand side of the panel) to display a tick.

4. Click the **Save** button.

### Using the Courses report

1. Ensure you are in the Academic Year 2016/2017 using **Tools | Academic Management | Set Academic Year**.
2. Use the route **Tools | Academic Management | Course Manager | Student Courses Report**.
3. Use the filters to check the students in the appropriate **Year Taught** in have the appropriate **Course Status** for the **Date Range** Current Academic Year.
Check Exam Awards have been linked for the Course

It is best practice to have a one to one relationship between Exam Awards and courses in SIMS. This ensures that the correct information from exams is filtered into the appropriate courses and that accurate Exams Analysis is possible.

This does create some additional work for Exams Officers when importing the basedata as some restructuring often needs to be done. E.g. AQA send one Award container for AS and A Level which contains both the required certification elements. This would need to be separated out into two separate awards in order to maintain the one to one relationship.

This is particularly important where exam results are available for students as the Census is required to return the Exam (AO) QN where a result is present rather than the QWS QN used for courses where no results are present. Therefore, if basedata is not available for new courses where results are not present it is only necessary to have the QWS QN available and the Exam can be linked at a later date.

1. Select Tools | Academic Management | Course Manager | Maintain Course to display the Find Course browser.
2. Search for then select the required course to display the Course Details page.
3. Select the Examination hyperlink to display the Examination panel.

It is best practice to only have one active award associated with a course at a time so you must determine which of the awards is current.

- Ensure that each award is applicable for the current season.
  This can be achieved by checking the Certification Elements before. The Certification Elements panel displays the elements for seasons that are relevant to the highlighted award within the From and To date range. You may need to expand the Season column to view the full season description.
  Click anywhere in the certification element row to display the Element Details pane to view all related information about the element.

- Add a To date to any award that was previously associated with the course but is no longer relevant. These awards should not be deleted, as the history will be lost.

  The From and To date fields in the Examination panel are blank initially because the previous version of Course Manager did not maintain the history between courses and exams. The awards are displayed in yellow to indicate that the date that they were associated with the course is not known.

  If the date ranges for the awards overlap, the records remain displayed in yellow until the overlap is corrected.

4. An explanation of why the award associated with the exam was changed can be entered in the Reason column, if required.
WARNING: It is possible to delete awards but the history will be lost.

If the student results are not displaying in the courses for the Academic Year 2016/2017 then this could be due to one of the following reasons:

1. The results have not yet been imported into Exams Organiser.
2. There is an issue with the Exam Award Link as described above. Please liaise with your Exams Officer.
3. There may be no basedata for the Exam so the results would have to be manually entered and linked to the course via Tools | Examinations | Edit PI Data. Please liaise with your Exams Officer.
4. This is a two year course and the students will not receive a result until the following year.
Check student membership for two year courses

It is important to ensure that two year courses are dealt with correctly with respect to Planned End Dates and the way that the EFA attribute the funding over the two years. This does not affect AS and A Level courses which are one year courses.

If a student started a two year course during the last academic year (2015/16) then their Planned end date on Year one of the course should reflect the two year nature of the course.

1. Identify any true two year courses.
2. Decide whether all courses at this level will have the same duration. If they will then the duration should be edited via the Course Manager Settings screen. If not, then the course can be edited individually via the Duration and Tolerance panel of the course itself.
3. Locate the course in Course Manager via Maintain Course and check and amend if necessary the Course Duration to two years.
4. Edit both the End Date and Planned End Date for each appropriate student and tick the Protect column.
5. Save the changes.
6. After the Census has been run and the two-year date collected, you will need to revisit the course and remove the ticks from the Protect column.

Note: If the protect ticks are not removed then this will prevent duration from working properly in year two of the course and you will end up with two one year entries for the student.

7. Click the Save button to save the changes.

Note: If you believe that you have returned incorrect Planned End Dates for 2016/2017 then there will be an option when running the Census return to collect Planned end dates from Course Manager rather than the previous Census.

See page 5 for further guidance on two year courses.

Note: For those students embarking on a two year course this year, SIMS will correctly add the end date as a date in 2017.
Prepare Programme Study Hours for the Autumn 2017 School Census

Programme Study Hours

The annual hours that count towards a course of study are categorised as Qualification - Planned Learning Hours or Non-Qualification Hours – Planned Employment, Enrichment and Pastoral Hours. To qualify for funding purposes, Planned Hours must be timetabled within your school's normal working pattern.

You can record information relating to Programmes of Study for Post 16 student, enabling you to submit details of the total Planned Qualification Hours and Planned Non-Qualification Hours in the Autumn School Census.

Planned hours are required for the 2017/2018 academic year only..

These qualification hours can be recorded in the following ways:

- **At Qualification Level** (for example, GCEAS) via Tools | Academic Management | Course Manager | Course Manager Settings. This will then filter through to any courses of that Qualification level.
- **At Course Level** via Tools | Academic Management | Maintain Course. These hours can then be calculated for all post-16 students, groups or individual students via the route Tools | Academic Management | Course Manager | Maintain Programmes of Study.
- **Manually by student**. If hours have not been entered via courses then hours can be manually allocated for all post-16 students, groups or individual students via the route Tools | Academic Management | Course Manager | Maintain Programmes of Study.
Maintaining Post-16 Programmes of Study

The maintain Post-16 Programmes of Study screen is accessed via Tools | Academic Management | Course Manager | Post-16 Programmes of Study.

Academic Year

Programme Study Hours are academic year specific. Therefore when completing this screen ensure you are in the correct academic year using the Academic Year filter at the top of the screen (i.e. 2017/18).

Funding Guidance for young people 2017 to 2018 - EFA

If the student is on a study programme that spans more than one funding year then these fields must be amended at the start of each funding year with only the planned hours recorded for each separate year of data. The total of both hours fields are used to determine the full or part time funding rate for the student.

Updating the Post-16 Study Programme Hours Manually

If schools do not wish to enter the hours via the courses then the hours can be added via the Post-16 Programmes of Study screen.

1. Open the route Tools | Academic Management | Course Manager | Maintain Programmes of Study.
2. This screen will display all post 16 students and their courses for the Academic Year displayed at the top of the screen. Programme Study Hours will need to be entered for 2017/18 only. Ensure that 2017/2018 is the selected year.
3. The Qual Hours and the Non-Qual Hrs can be directly edited by simply highlighting the student and typing in the required hours into the appropriate column. This can also be achieved for multiple student using a Ctrl Click to select the required students.
4. The TT Hours column is to assist schools with the hours a week the student studies all the courses shown on their row. To allow for longer cycles, the number of periods of the class on the cycle is divided by the number of days in the cycle and multiplied by 5.
5. The students can be filtered by Year taught In.
6. Students can also be filtered by the number of Occurrences of a certain Level of qualification.
7. All students can be selected by using a right click on a student and Select All.
8. Consider using the Overwrite existing values tick if any students displayed have values entered.
9. Entering a value in the box above either the Qualification or Non Qualification hour column and using the green arrow will update the appropriate column for all the selected students.
10. If you are entering hours for students who already have hours entered and have the Overwrite existing values selected then you will be prompted if you wish to overwrite with the new figure, add the new figure or subtract the figure from the existing values.
11. You may want to use the Notes section to keep a record of non-timetabled hours i.e. lunchtime. Notes can be entered for multiple students by using a Ctrl Click to select and adding the required note to the bottom selected student.

**NOTE:** The other right mouse click options on a student record allow you to be linked directly to the student details screen or to view the individual student courses screen. Students can also be selected by using **Shift** and **left-click** to select contiguous students and **Ctrl** and **left-click** to select non-contiguous students.

### Calculating Programme Study Hours from Courses

As described earlier in the document the hours for courses can be entered by level which will then filter the hours through to all courses at that level or they can be added/amended at individual course level.

1. Ensure the hours have been entered accordingly via the Course Manager Settings screen or individually via a course.
2. Open the route **Tools | Academic Management | Course Manager | Maintain Programmes of Study**.
3. This screen will display all post 16 students and their courses for the academic year displayed at the top of the screen.
4. We now want to populate the hours we entered against the courses against the students.
5. Right Click on a Student a choose **Select All**.
6. Click the **Calculate Hours from Courses** button.
7. Notice the message displayed.

**NOTE:** The other right mouse click options on a student record allow you to be linked directly to the student details screen or to view the individual student courses screen. Students can also be selected by using **Shift** and **left-click** to select contiguous students and **Ctrl** and **left-click** to select non-contiguous students.

8. Tick the box to **Overwrite existing values**.
9. Click on **Calculate Hours from Courses**. Click on **OK** to confirm. The screen will be populated using the values entered against the courses.
10. Click **Save** to save the details.
11. You may then want to individually edit the hours for some students.

**Note:** Courses like work experience may not happen for the whole academic year. Only courses active on the Census date will be collected in the Maintain Programme of Study screen.
Core learning Aims

The School Census Autumn 2017 Return requires that the core aim is identified for each year where a vocational Education Funding Agency (EFA) study programme is being followed.

A Core Learning Aim is a student's primary course of study within their programme of study.

It is quite possible to have a different core aim for 2016/2017 than for 2017/2018. Course Manager allows only one course of study per student to be flagged as a core aim per academic year. If the student is enrolled on a two year course, you must flag the second year of study as a core aim when the academic year changes.

However, there are certain unusual circumstances where more than one core aim is allowed, e.g. where a student has a two year course and a one year course. In the first year, their core aim is the one year course and in the second year, their core aim is the second year of the two year course.

<table>
<thead>
<tr>
<th>first year of a two year course</th>
<th>second year of a two year course</th>
</tr>
</thead>
<tbody>
<tr>
<td>Core Aim</td>
<td></td>
</tr>
<tr>
<td>one year course</td>
<td></td>
</tr>
</tbody>
</table>

Core Aim

The additional core aims can be entered directly into the Learning Aims panel (via Routines | Statutory Returns | School Census).

If a student is following a purely academic programme, a core aim does not need to be identified.

The core aim is used:

- to calculate programme cost weighting,
- to determine whether a student is retained on the programme or not, and
- whether the programme is academic or vocational.

The table overleaf indicates those qualification types that are academic. If the student’s core aim in the ILR is not one of the listed types, the student’s programme is vocational. For the school census the same logic applies, with the addition that if the core aim is not returned for a student (the core aim is not mandatory in the school census) their programme will be deemed academic.
Core aims in academic programmes

<table>
<thead>
<tr>
<th>Level</th>
<th>Qualification types</th>
</tr>
</thead>
</table>
| 3     | GCEs: AS, A2, A with AS levels; double awards count as two academic qualifications (General Studies and Critical Thinking are excluded).  
    | IB Diploma.  
    | IB Certificates.  
    | Cambridge Pre-U Diploma.  
    | Access to HE Diploma. |
| 2     | GCSEs – including vocational.  
    | GCSE short courses.  
    | Free standing maths qualifications (FSMQs). |

(Extract from 16 to 19 Funding: core aims in study programmes guidance)

A Levels in Critical Thinking and General Studies should not be core aims. However, the planned hours associated with them should be included in the total for the purposes of determining the planned programme hours.

The Core aim can be identified in the following ways:

- Individually to student via Focus | Student | Courses.
- Globally at course level via Tools | Academic Management | Maintain Course.

There is the option to add and edit this data via the Autumn School Census Return available via Routines | Statutory Returns | School Census

Identifying an Individual Student’s Core Learning Aim

This is available from within the route Focus | Student | Courses (this is the same route as using the Courses link from within an individual student record).

1. Ensure you are in the correct academic year via Tools | Academic Management | Set Academic Year.
2. Select Focus | Student | Courses.
3. Locate and open the record of an appropriate Sixth Form Student.
4. Click on the appropriate Learning aim and note that the Set Core Aim button (top right) becomes active, (as shown in the graphic).
5. Click the **Set Core Aim** button and note the selected course becomes bold and has **(Core Learning Aim)** added.

6. Click the **Save** button to save the change.

Other students can be located either by using the **Next** and **Previous** buttons in this window or by returning to the **browse** button for further selection.

**NOTE:** The Set Core Aim button is only available for students in NC Year 12 or above.

Further information on Core Learning Aims can be found in the 16 to 19 Funding: core aims in study programmes guidance.

Identifying a Core Learning Aim at Course Level

It may be that the core learning aim for a group of students on the same course is the same. If this is the case then rather than setting the core aim individually it will be easier to do it by course.

1. Ensure you are in the Correct Academic year via Tools | Academic Management | Set Academic Year.
2. Select Tools | Academic Management | Course Manager | Maintain Course.
3. Ensure you have View memberships set to Current Academic Year, not Census View.
4. Go to the Memberships and Results panel.
5. Clicking into the Core Aim column for one student will update the Core Aim for that student.
6. Right click in the Core Aim column. An option will appear for you to Set this course as Core Aim for all these students.
7. Clicking on this option will tick the Core Aim column for all students.
8. Save the course.

NOTE: The census return will also allow a school to enter more than one learning aim for a student for an academic year as long as they are for courses where the memberships do not overlap.

Changes made to the core learning aim from that collected via Course Manager will be highlighted in yellow on this screen.
Recording Post 16 Employment Information

Schools in England should record employment details for Post 16 students whose Year Taught In is 12 or above.

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

1. Select Focus | Student | Student Details to display the Find Student browser.
2. Search for then select the required student to display the Student Details page.
3. Click the Additional Information hyperlink and then navigate to the Post-16 Employment section at the bottom of the Additional Information panel.

4. Click the New button to add a new employment record to display the Add Employment Details dialog.

Alternatively, highlight an existing entry then click the Open button to display the Edit Employment Details dialog.

5. Select the Employment Type from the drop-down list, i.e. Weekends out of school hours, Weekday(s) out of school hours or School Hours.
6. Enter the Start Date of the employment period or click the Calendar button then selecting the required date.
7. Specify the End Date of the employment, if applicable.
8. Enter the number of Hours/Week, together with any Notes.
9. Click the OK button to return to the Student Details page.
10. Click the Save button.
## Additional Information

### Managing Performance Indicators – Liaise with Exams Officer

To ensure a smooth transition between the former process of importing the Performance Measures file and the new process of managing performance indicator details in school, the following check list provides an outline of the necessary actions in the order in which they must be undertaken.

<table>
<thead>
<tr>
<th>Step No.</th>
<th>Action</th>
<th>Location or Menu Route</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step 1</td>
<td>Define the new Summer season in Examinations Organiser.</td>
<td>In Examinations Organiser, via **Tools</td>
</tr>
<tr>
<td>Step 2</td>
<td>Download and import the most up-to-date QWS files.</td>
<td>In SIMS, via **Tools</td>
</tr>
<tr>
<td>Step 3</td>
<td>On the <strong>PI Setup</strong> page, set the new Summer season as the default PI Summer season and ensure it is unlocked.</td>
<td>In SIMS, via **Tools</td>
</tr>
<tr>
<td>Step 4</td>
<td>Clone the QNs used in the previous year so that they are copied into the new Summer season.</td>
<td>In SIMS, via **Tools</td>
</tr>
<tr>
<td>Step 5</td>
<td>Search for and delete any QNs that will not be in use this year.</td>
<td>In SIMS, via **Tools</td>
</tr>
<tr>
<td>Step 6</td>
<td>Manually add any additional QNs that will be required for the new season.</td>
<td>In SIMS, via **Tools</td>
</tr>
<tr>
<td>Step 7</td>
<td>Work through the <strong>Performance Indicator Details</strong> for each QN type and check that the details, point values and entry equivalences are recorded accurately for Key Stage 4 and 16 to 18 year olds for the forthcoming exams season.</td>
<td>In SIMS, via **Tools</td>
</tr>
</tbody>
</table>

This list is provided to ensure all steps are completed. There are a number of processes included on the list that are not within the scope of this document. Further information on these steps can be obtained from the following handbooks within the SIMS documentation centre: “Processing Results and Calculating PI Data in Exams and SIMS”.

1. From the SIMS homepage click **Documentation**.
2. Choose the role of **Exams & Assessment**.

3. Within the Examinations sections you will have access to all the necessary instructions to complete the necessary tasks.

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**Reviewing QAN Imports**

Once you have imported the relevant Performance Measures XML file, two reports are available that enable you to check the integrity of the QANs in the basedata:

- **Certification Elements without QANs** - this report lists the series code, series description, Board, entry code and the title of all basedata elements without a QAN. You must enter the missing QANs via Examinations Organiser (**Focus | Basedata - Basedata for <Season>** dialog) to ensure the accuracy of the PI data.

- **Certification Elements with unmatched QANs** - this report lists the series code, series description, Board, entry code, title and QAN of all basedata elements that have a different QAN from the QAN details provided in the Performance Measures file. You must correct the QANs in the basedata to ensure the accuracy of the PI data in Examinations Organiser.
Click the relevant **Report** button to run the report. The report is displayed in your web browser from where it can be printed, if required.
Linking Non-EDI Exam Information to a Course – Liaise with Exams Officer

The Performance Indicator (PI) routines (now available via the **Tools** menu in SIMS) assist with the non-electronic data interchange (EDI) results entry. Course Manager provides a streamlined and seamless approach to the allocation of QANs to facilitate accurate Post 16 funding.

To ensure that the non-EDI data is displayed in the School Census **Learning Aims** panel automatically, it must be linked to a course.

1. Select **Tools | Examinations | Edit PI Data** to display a confirmation dialog.
2. Confirm that your QWS QAN Catalogue and Performance Measures file imports are up-to-date by clicking the **OK** button.

![SIMS.net](Image)

3. If PI cohorts exist, you are asked if you want the system to update the PI cohort memberships. Click the **Yes** or **No** button, as required.
4. The **Edit PI Data** page is displayed.
5. Select the check box adjacent to the name of the required candidates.

![Current Session (June/Summer Exams) Entry 2017](Image)

6. Click the **Add Results** button to display the **Add Results** dialog.
The selected students are displayed in the lower panel, where they can be removed or other students added, if required.

7. Start to enter the relevant QAN code (without slashes) to display a list of examination/courses that match the entry.

8. Click the required examination/course to populate the QAN field.
9. Click the Refresh button to populate the Subject, Level, Awarding Body and exam Title fields automatically.

If the course is already linked to a QAN/discount code, the Course field is populated automatically. However, as shown in this example, if this is not the case, the Course must be selected from the drop-down list.

The button name changes from Refresh to Change and the QAN field is disabled.
10. Select the **Grade** from the drop-down list. The equivalence entry fields and **Points** field are populated automatically.

11. Select the **Discounted** check box, if applicable.

12. Click the **Save** button then confirm that the details are correct by clicking the **Yes** button.

The data is then available to Performance Indicator, Course Manager and School Census.

The results data entered in the **Add Results** dialog (described in this section) is displayed in the School Census **Learning Aims** panel when the details are calculated/recalculated via **Routines | Statutory Returns | School Census**. However, if you want to preserve any information entered manually in the **Learning Aims** panel, you must click the **Recalculate** button and **not** the **Calculate All Details** button.

**WARNING:** Clicking the **Calculate All Details** button overwrites all manual edits.
The Census 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
Preparing Post 16 data for the Autumn 2017 School Census

| Surname  | Forename | YTI | UIN   | Subject | Level | Start Date | End Date | P End Date | Core AL | Status        | Withdrawal Reason | QAN               | Disc No | Provider UKPR | Trainee? | Result |
|----------|----------|-----|-------|---------|-------|------------|----------|------------|---------|----------|-----------------|------------------|------------------|--------|-------------|---------|--------|
| Abbey    | Grenetta | 13  | 1111171873 | Art     | GCE Advanced Subsidy | 01/09/2016 | 21/07/2017 | 21/07/2017 | ✔ | Completed |                 | 60149577 | J2       | ✔       |        |
| Abbey    | Grenetta | 13  | 1111171873 | Business Studies | GCE A Double Award | 01/09/2016 | 21/07/2017 | 21/07/2017 | ✔ | Completed |                 | 50096289 | VF2      | ✔       |        |
| Abbey    | Grenetta | 13  | 1111171873 | CDT Des & Real | GCE Advanced Subsidy | 01/09/2016 | 21/07/2017 | 21/07/2017 | ✔ | Completed |                 | 60148222 | 3219    | ✔       |        |
| Abbey    | Grenetta | 13  | 1111171873 | Physics | GCE Advanced Subsidy | 01/09/2016 | 21/07/2017 | 21/07/2017 | ✔ | Completed |                 | 50096290 | VF2      | ✔       |        |
| Ackton   | William  | 13  | 1111176603 | CDT Des & Real | GCE Advanced Subsidy | 01/09/2016 | 21/07/2017 | 21/07/2017 | ✔ | Completed |                 | 60148470 | 1219    | ✔       |        |
| Ackton   | William  | 13  | 1111176603 | Chemistry | GCE Advanced Subsidy | 01/09/2016 | 21/07/2017 | 21/07/2017 | ✔ | Completed |                 | 60156478 | 1119    | ✔       |        |
| Ackton   | William  | 13  | 1111176603 | French | GCE Advanced Subsidy | 01/09/2016 | 21/07/2017 | 21/07/2017 | ✔ | Completed |                 | 60170307 | 5859    | ✔       |        |
| Ackton   | William  | 13  | 1111176603 | Mathematics | GCE Advanced Subsidy | 01/09/2016 | 21/07/2017 | 21/07/2017 | ✔ | Completed |                 | 10060121 | R61A    | ✔       |        |
| Adams    | Melanie  | 13  | 1111169568 | Art     | GCE Advanced | 01/09/2016 | 03/02/2017 | 21/07/2017 | ✔ | Withdrawn | Injury/Illness | 60145039 | 3519    | B        |        |
| Adams    | Melanie  | 13  | 1111169568 | Biology | GCE Advanced | 01/09/2016 | 03/02/2017 | 21/07/2017 | ✔ | Completed |                 | 60153015 | 1019    | ✔       |        |
| Astama   | Melanie  | 13  | 1111169986 | Geography | GCE Advanced | 01/09/2016 | 03/02/2017 | 21/07/2017 | ✔ | Completed |                 | 50002388 | 3919    | ✔       |        |
| Astama   | Melanie  | 13  | 1111169986 | Law     | GCE Advanced | 01/09/2016 | 03/02/2017 | 21/07/2017 | ✔ | Completed |                 | 50002350 | 4799    | ✔       |        |
| Ahmed    | Ackmar   | 13  | 1111171849 | Art     | GCE Advanced Subsidy | 01/09/2016 | 23/02/2017 | 21/07/2017 | ✔ | Withdrawn | Personal | 60145877 | J2       | A        |        |
| Ahmed    | Ackmar   | 13  | 1111171849 | English Lit | GCE Advanced Subsidy | 01/09/2016 | 23/02/2017 | 21/07/2017 | ✔ | Completed |                 | 60150547 | 5119    | A        |        |
| Ahmed    | Ackmar   | 13  | 1111171849 | Mathematics | GCE Advanced Subsidy | 01/09/2016 | 20/01/2017 | 21/07/2017 | ✔ | Transferred |                 | 10060121 | R61A    | A        |        |
| Amin     | Tanzel   | 13  | 1111171822 | English | GCE Advanced Subsidy | 01/09/2016 | 21/07/2017 | 21/07/2017 | ✔ | Completed |                 | 60149140 | 1609    | ✔       |        |
| Amin     | Tanzel   | 13  | 1111171822 | Law     | GCE Advanced Subsidy | 01/09/2016 | 21/07/2017 | 21/07/2017 | ✔ | Completed |                 | 50022249 | J41C    | ✔       |        |
| Amin     | Tanzel   | 13  | 1111171822 | Sociology | GCE Advanced Subsidy | 01/09/2016 | 21/07/2017 | 21/07/2017 | ✔ | Completed |                 | 60130959 | J4059    | ✔       |        |

Total: 590
Preparing Post 16 data for the Autumn 2017 School Census

1. To sort the displayed data by column data, e.g. **Surname**, **Forename**, **YTI**, **ULN**, etc, click the applicable column heading.

2. 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.

3. 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.

4. The **Add** button is active only when the **Unlock Padlock** icon is displayed. Learning Aims records can be added to the list by clicking the **Add** button to display the **Add Learning Aims** dialog, from where the required student's Learning Aim(s) can be selected.

5. The **Exclude/Restore** toggle button is active only when the **Unlock Padlock** icon is displayed. A Learning Aim record can be excluded from the list, and consequently from the return, by highlighting it then clicking the **Exclude** button. The excluded Learning Aim record is then highlighted in dark grey and is read-only. To **restore** the Learning Aim record, click the record to ensure that the focus is on the Learning Aim then click the **Restore** button.

6. The data in the **Learning Aims** panel can be filtered using one or more of the **Search** options, i.e. **Surname**, **Forename**, **YTI** (Year Taught In), **ULN**, **QAN**, Discount Code (**Disc Code**), **Subject**, **Level**, **Status** and date range (by default **From** 01/08/2016 **To** 05/10/2017).

   Using these filters restricts the data displayed in the **Learning Aims** 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 **Search** button.

7. Clicking the **Recalculate** button refreshes the **Learning Aims** panel with Learning Aims from Course Manager and exams data from Examinations Organiser.

   **IMPORTANT NOTE**: Clicking the **Recalculate** button preserves any manual edits that have already been saved (**Learning Aims** panel only).

8. The **Locked Padlock** icon indicates that editing of Learning Aims data is unavailable. Click the **Padlock** 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 **Unlocked Padlock** icon is displayed. Full editing capabilities are then available for the data in the rows displayed with a white background.
| 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. |
Preparing Post 16 data for the Autumn 2017 School Census

16 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.

17 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.

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

19 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.

20 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.
Preparing Post 16 data for the Autumn 2017 School Census

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.
Preparing Post 16 data for the Autumn 2017 School Census

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.

Various colours may display on the report to identify missing, conflicting, unmatched or incomplete data.

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.

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.

3. The additional row will appear at the end of the learning aims.
4. 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.
Preparing Post 16 data for the Autumn 2017 School Census

5. Click the **Save** button.

**Autumn 2017 Census Reports**

**NOTE:** The School Census Autumn 2017 Return must be created and validated before the Summary report or any of the detail reports can be run.

The following Learning Aims related reports are available via **Routines | Statutory Returns | School Census**.

**Summary Report**

The School Census Autumn 2017 Summary report is provided by the DfE via an XSL file and summarises the content of the XML Return file.

**Detail Reports**

The detail reports, which are provided by Capita SIMS, can be produced as soon as the return has been created and validated.

The reports listed here are those that deal with basic details and those that are specific to Learning Aims. Several additional report are available from the Detail Report drop down list, located at the top of the Census Return Details page, (**Routines | Statutory Returns | School Census**), if required.

**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, proficiency in English, nationality, country of birth, Youth Support Services Agreement (YSSA), part-time status, boarder status, class type, hours at setting and funded hours.

**Leavers Basic Details Report**

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

- Leavers with attendance 1 term ago (17/04/2017 - 31/07/2017)
- Leavers with exclusions 2 terms ago (01/01/2017 – 16/04/2017)
- Leavers with Learning Aims from 01/08/2016 – 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.
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.

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).

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.

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:
Preparing Post 16 data for the Autumn 2017 School Census

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.

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.

**Identifying expired QNs**

Another useful feature to be aware of is the ability to see immediately courses whose QNs have expired. Select:

- **Tools | Academic Management | Course Manager | Maintain Course** and click on Search.
  
The display shows you the details of all active courses, including the QAN and the QAN Expiry Date – after this date the qualification is not approved for use and should only appear against a student who is re-sitting in the current year.

- Sorting the display by the QAN Expiry Date will enable you to quickly identify expired QNs.