Autumn 2017
School Census
Guidance

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

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

If you have any queries relating to the DfE Guidance, please contact the Business Intelligence and Performance Improvement Team on 01604 366190

or email

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

New data items

(a) Disability Access Fund (Applicable to Primary schools with a Nursery)

Tools | Statutory Return Tools | Update Early Years

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

(b) Extended Funded Hours (Applicable to Primary schools with a Nursery)

Tools | Statutory Return Tools | Update Early Years

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

(c) 30 Hour Code (Applicable to Primary schools with a Nursery)

Tools | Statutory Return Tools | Update Early Years

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

(d) Establishment Unique Reference Number

Focus | School | School Details

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

(e) Hours and Minutes Format (Applicable to Primary schools with a Nursery)

Tools | Statutory Return Tools | Update Early Years

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

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

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

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

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

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

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

Copying a Return File

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

| Any values for Attendance, Hours for Early Years, Adopted from Care and Top-up Funding WILL NOT BE COPIED but will be populated from the current values held in the database. |
| Create & Validate must be run in order to generate a new census file. |
| Do you want to make a copy of the return "<return name>"? |

Deadlines

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

Introduction

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

The Census Dates for 2017/2018 are:

- (Autumn) first Thursday in October (5th October 2017)
- (Spring) third Thursday in January (18th January 2018)
- (Summer) third Thursday in May (17th May 2018)

The table below gives a summary of which data areas will be collected in each census.

<table>
<thead>
<tr>
<th>Module</th>
<th>Autumn Census</th>
<th>Spring Census</th>
<th>Summer Census</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pupil ID</td>
<td>✓</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Pupil Characteristics</td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Pupil Status</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>SEN</td>
<td>✓</td>
<td>✓</td>
<td>One data item</td>
</tr>
</tbody>
</table>
This document is designed to help you through the processes required to complete your Autumn Census 2017 return using SIMS. The notes are designed to be used in conjunction with the 2017/2018 DfE Guidance notes which can be downloaded from:


Important note for Academies

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


ALL SCHOOLS INCLUDING ACADEMIES

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

REMEMBER TO SEND A COPY OF YOUR CENSUS FILE TO NORTHAMPTONSHIRE COUNTY COUNCIL VIA AnyComms – see page 48. The reasons for this request are outlined in the Data Exchange Agreement signed by each Academy.
## Data Checklist – Autumn Census 2017

<table>
<thead>
<tr>
<th>Tasks to be completed prior to Census day</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Ensure Summer Census has been authorised</strong></td>
</tr>
<tr>
<td>The School Census Summer 2017 Return must be completed and accepted by Northamptonshire County Council or DfE COLLECT (for Academies) before upgrading to the SIMS 2017 Summer Release (7.176).</td>
</tr>
<tr>
<td>When the SIMS 2017 Summer Release is applied, the functionality to run the Summer 2017 School Census return is removed.</td>
</tr>
<tr>
<td><strong>Upgrade to the SIMS 2017 Summer Release</strong></td>
</tr>
<tr>
<td>Upgrade to a minimum of SIMS 2017 Summer Release 7.176. To check which version you are using, open SIMS and go to Help</td>
</tr>
<tr>
<td><strong>Check that the latest Fileset has been imported</strong></td>
</tr>
<tr>
<td>Check the Capita ESS website to see which, if any, fileset is available. Check Routines</td>
</tr>
<tr>
<td><strong>Check School Details</strong></td>
</tr>
<tr>
<td>Ensure that school details have been kept up to date. <strong>Ensure School URN is included – New requirement.</strong> See page 14 for further help.</td>
</tr>
<tr>
<td><strong>Check Attendance</strong></td>
</tr>
<tr>
<td>Attendance is collected Terms 5 &amp; 6 of the previous school year. Please ensure that you deal with all missing marks and unexplained absences. See page 70 for further help.</td>
</tr>
<tr>
<td><strong>Update Class Type</strong></td>
</tr>
<tr>
<td>Check class type is correct and update if necessary. Go to Tools</td>
</tr>
<tr>
<td><strong>Update Hours for Early Years.</strong> Note: change to collection requirements – See page 18.</td>
</tr>
<tr>
<td>Check Hours at Setting and Funded Hours are correct and update if necessary. <strong>Add any extended hours, 30-hour codes and disability funding.</strong> Go to Tools</td>
</tr>
<tr>
<td><strong>Update Top up Funding</strong></td>
</tr>
<tr>
<td>Ensure that you have listed all those pupils who are receiving Top-up Funding. Go to Tools</td>
</tr>
<tr>
<td><strong>Update Post Looked After Arrangements</strong></td>
</tr>
<tr>
<td>Ensure that all pupils where you have been notified as being adopted from care are recorded correctly. Go to Tools</td>
</tr>
<tr>
<td>Tasks to be completed prior to Census day</td>
</tr>
<tr>
<td>-------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Create a Dry Run</strong></td>
</tr>
<tr>
<td>Complete a dry run and solve any errors. See page 30 for further help.</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td><strong>Run Detailed Reports</strong></td>
</tr>
<tr>
<td>Print out detailed reports for appointed staff to check and agree. See page</td>
</tr>
<tr>
<td>34 for further help on detailed reports.</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td><strong>Check Free School Meal Eligibility Against the FSM report</strong></td>
</tr>
<tr>
<td>Check pupils eligible for FSM on Census day. Also check that those whose</td>
</tr>
<tr>
<td>eligibility has stopped have an End Date. See page 51 for further help on</td>
</tr>
<tr>
<td>adding or amending FSM data.</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td><strong>Check Exclusions against the Exclusions report</strong></td>
</tr>
<tr>
<td>Details will be collected of all permanent and fixed term exclusions for</td>
</tr>
<tr>
<td>Terms 3 &amp; 4 of the last academic year (01/01/17 – 16/04/17). See page 54 for</td>
</tr>
<tr>
<td>further help on adding or amending exclusions.</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td><strong>Check NC Year Actual against the Basic Details report</strong></td>
</tr>
<tr>
<td>Double check that those pupils who are taught out of year are correctly</td>
</tr>
<tr>
<td>recorded in Pupil Details</td>
</tr>
<tr>
<td>highlighting in YTI column. See page 60 for further help in adding or</td>
</tr>
<tr>
<td>amending this data.</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td><strong>Check Enrolment status against the Basic Details report</strong></td>
</tr>
<tr>
<td>Make sure that all pupils attending your school and another (For example:</td>
</tr>
<tr>
<td>Managed Moves; Special; PRUs; Hospital Schools) have the correct Enrolment</td>
</tr>
<tr>
<td>Status in the Basic Details report. See page 62 for further help on</td>
</tr>
<tr>
<td>amending this data.</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td><strong>Check Leavers and Re-Admissions against the Leavers Report</strong></td>
</tr>
<tr>
<td>Check that all your leavers are taken off-roll and any returning pupils</td>
</tr>
<tr>
<td>have been re-admitted. See page 58 for further help in amending this data.</td>
</tr>
</tbody>
</table>
## Tasks to be completed on Census day

<table>
<thead>
<tr>
<th>Task</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Enter School Dinners Taken details</strong></td>
<td>Reception, Years 1 &amp; 2 only See page 41 for further help.</td>
</tr>
<tr>
<td><strong>Create and Validate Census Return</strong></td>
<td>See page 44 for further help.</td>
</tr>
<tr>
<td><strong>Run Detailed Reports</strong></td>
<td>Print out detailed reports for appointed staff to check and agree. For further help see page 34.</td>
</tr>
</tbody>
</table>
| **Check the Summary Report**                                       | Print out and check the summary report and ask the Head Teacher (or equivalent) to check and agree it. For further help see page 46.  

*The figures shown here summarise your census return, and will have an impact on the funding allocated to your school if it is incorrect, so it is imperative that it is checked and all figures are accurate.*
| **Authorise the Autumn Census return**                             | See page 46 for further help.                                         |
| **Upload census file to Collect**                                  | Academies only Academies should upload their census to Collect prior to completing the final task. See page 48 for further help. |
| **Upload census file to AnyComms (AVCO)**                          | See page 48 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.

Importing Revised Filesets for Validation and Reports

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

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

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

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

Personnel Officer
Returns Manager
System Manager.

IMPORTANT NOTE: The report files are not always updated between releases. Therefore, it is not always necessary to use the Import Fileset routine. A news feed will be posted on www.capitaess.co.uk website if updated files are available for import.
If revised files are supplied, the fileset will be available as a .ZIP file, which should be downloaded, unzipped and then imported into the SIMS Document Management Server (DMS) via Tools | Setups | Import Fileset. Ensure that the DMS is configured correctly before attempting to import the files.

Tip: To check which version of the fileset is currently in use, select Routines | Statutory Returns | School Census to display the Census Return browser. The Validation Fileset ID is displayed in the header of the browser.

Importing the Revised Filesets

1. If revised filesets are supplied, download the required ZIP file from www.capitaess.co.uk website to a folder of your choice.
2. Unzip the ZIP file to a folder of your choice.
3. In SIMS, select Tools | Setups | Import Fileset to display the Import Fileset page.
4. Click the Browse button to display the Open dialog.

NOTE: The following graphics show example data only.

5. Navigate to the location of the downloaded fileset. The file name is made up of the following data fields: <Fileset Number>-<Census Name>-<Term and Year>_Fileset.mfs.
6. Highlight the file then click the Open button. Alternatively, double-click the required .MFS file to return to the Import Fileset page.

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

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

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

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

9. Run the return in the usual way
Checking School Level Information

Checking Establishment Details

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

- School Type
- School Governance
- Intake Type.

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

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

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

![Census Screen]

New data item for Autumn 2017

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

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

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

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

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

- School Email Address
- School Telephone Number (including STD code)
1. Select Focus | School | School Details to display the School Details page.
2. Click the Contact Details hyperlink to display the Contact Details panel.
3. Ensure that a Telephone number has been recorded (including the STD code).
4. Ensure that the school's official communications Email address has been recorded correctly (it must include the @ character together with a minimum of one full stop).
5. Click on the save button if you have made any amendments.

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

**Information for Academies:**

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

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

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

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

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

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

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

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

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

**Resetting All Class Types**

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

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

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

**Update Hours for Early Years**

**Early Years**

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

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

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

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

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

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

**Funded Hours and Hours at Setting**

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

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

The hours collected in this return are for the week in which the census day falls.
Census | Phase & year group | Date of birth ranges | Free entitlement to funded hours
---|---|---|---
Autumn, Spring and Summer | All relevant schools and year groups | 01/09/2013 to 31/08/2015 inclusive | 15 hours
| All schools (excluding Nursery Schools) – National Curriculum year groups E1, E2, N1 and N2 only. For Nursery schools – All year groups. NB No longer applies to Reception (Year R) | 01/09/2012 to 31/08/2013 inclusive | 15 hours

Disability Access Fund

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

- They are in receipt of child Disability Living Allowance (DLA)
- They access their entitlement to free early learning and childcare, e.g. funded hours.

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

Extended Funded Hours and 30 Hour Code

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

6. Choose **Select All**

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

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

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

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

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

1. Select the required year group from the **Year Taught In** drop-down list. The selected pupils only are displayed in the **Pupils** panel.

2. **Right-click** in the **Pupils** panel then choose **Select All** from the drop-down list.

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

The number is entered automatically for all selected pupils.
4. Click to the right of the grid to deselect all.
5. Edit the entry for each pupil who is receiving a different number of hours. This is achieved by highlighting the required pupil, clicking in the associated Hours at Setting (or Funded Hours) cell, as applicable, then entering the required number.
6. Click the Save button. If there are any pupils where zero hours have been recorded, a message is displayed. Click the Yes button to save the data or the No button to return to the Update Hours page where the number of hours can be entered.

**Updating Pupils with Top-Up Funding**

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

1. To indicate which pupils receive top-up funding select Tools | Statutory Return Tools | Update Top-Up Funding
2. You may be asked if you wish to copy forward the pupils from Summer. Click Yes. Any pupils currently recorded as having top-up funding are displayed in the Top-up Funding table.

3. Use the search criteria to locate any additional pupils you wish to record as having top-up funding then highlight their details.
4. Click Search.
5. Click the **Add** button. The highlighted pupils are displayed in the **Top-up Funding** table.

6. To remove a pupil from the list, **highlight** the required pupil then click the **Remove** button. The pupil's record is displayed in the first table, providing a chance to reselect the pupil, if required.

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

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

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

   Any pupils currently recorded as ceased to be looked after are displayed in the **Post Looked After Arrangements** table.

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

4. Ensure that the post looked after arrangements status is displayed for all the pupils by clicking the PLAA cell then selecting the applicable status from the drop-down list:
   - Ceased to be looked after through Adoption
   - Ceased to be looked after through a Special Guardianship Order (SGO)
   - Ceased to be looked after through a Residence Order (RO)
   - Ceased to be looked after through a Child Arrangement Order (CAO).
5. If you tick the box to say that evidence has been obtained, then you will be warned to ensure that the evidence is kept securely. Click OK.

6. To remove a pupil from the list, highlight the required pupil then click the Remove button. The pupil's record is displayed in the first table, providing a chance to reselect the pupil, if required.

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

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

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

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

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

The following sections provide additional information and specific instructions on checking and completing pupil level data. Some of this data can be checked/updated using the Bulk Update routine. When you have upgraded to the SIMS 2017 Summer Release (SIMS 7.176), it is strongly recommended that one or more dry runs are carried out in order to identify the validation errors and queries that need to be resolved.

Using the Bulk Update Routine

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

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

For example, it is possible to search for all pupils who do not have a Nationality recorded against their name. From the pupils found, a value can be assigned to all or several pupils. This prevents the need to enter/change values manually for individual pupils.

1. Select **Routines | Pupil | Bulk Update** to display the **Bulk update Student** browser.
2. In the **Bulk Update** panel, select the required **Group Type** and **Group** from the drop-down lists. (See table below)

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

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

It is also possible to use this functionality to review the data entered for all the pupils in the school. This is achieved by selecting Year Group from the **Group Type** drop-down list and <ANY> from the **Group** drop-down list, then selecting the required **Data Item**.
The following table provides some examples of the searches that can be carried out to identify missing data:

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

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

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

5. When the required criteria have been selected, click the Search button to display the Members panel, which displays a list of pupils matching the chosen criteria and the choice of Pupil Nationality types.

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

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

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

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

   All the cells within that column are populated with ticks.

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

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

**Bulk Updating Data for a Selection of Pupils**

There are two methods for selecting a number of pupils.

**Entering Values for a Selection of Pupils**

1. **Highlight** the first pupil you wish to select then hold down the **Ctrl** key and highlight the other required pupils.

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

   A tick indicates that the pupil has been assigned that value.
Entering Values for Sequentially Listed Pupils

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

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

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

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

Whilst a significant number of errors may be generated, many of the errors that relate to pupils, e.g. language, SEN provision type, etc. can be fixed quickly using the processes mentioned previously in this guidance.

The Dry Run Process

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

2. Select an existing School **Census Folder** or enter a new location in which the School Census files will be stored. You may wish to make this a temporary folder for the purpose of producing a dry run. For the main return the School **Census Folder** should be set as n:sims\star\ascout where n: is the drive letter of your sims directory (usually c: or s:).

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

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

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

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

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

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

**Resolving Validation Errors and Checking Queries**

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

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

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

To assist in the resolution of any errors and queries:
When the mouse pointer is hovered over a **Message**, **Location** or **Solution** cell, hover help displays the entire content of that cell.

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

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

The pupil search functionality can be used to display all errors and queries relating to a particular pupil. Enter all or part of a UPN, pupil's surname or date of birth in the **Student Search** field then select the required record from the **Student Search** drop-down list and click the **Find** button.
Click a **Solution** hyperlink to display the area of SIMS where the associated issue can be checked/corrected. When you return to the **Validation Errors Summary** panel, the details of the applicable pupil are displayed in the **Student Search** field, the corrected error will not be removed from the list until you next **Create and Validate**.

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

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

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

View a summary of validation failures (particularly useful if there are a large number of errors/queries) by clicking the **Report** button, which is located above the **Validation Errors Summary** panel. The report is displayed in a web browser, e.g. Windows® Internet Explorer®, from where it can be printed.

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

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

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

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

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

**Producing Detail Reports**

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

Each detail report header displays the **Security Message** that was defined in the **Census Return** browser, the **Report Criteria** and the **Total Pupils** that are listed in the report.

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

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

**On-Roll Basic Details Report**

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

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

**Leavers Basic Details Report**

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

- Leavers with attendance 1 term ago (17/04/2017 to 31/07/2017)
- Leavers with exclusions 2 terms ago (01/01/2017 - 16/04/2017)

This report provides the following information about pupil/students not on-roll on census day (Leavers): UPN, 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, and exclusions.

**Exclusions Report**

*Report Criteria*: On-roll pupil/students and leavers with exclusions two terms ago (01/01/2017 to 16/04/2017). Not applicable to pupil/students who have exclusions with appeal result of Reinstated or Not in the best interests of the child.

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

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

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

Totals are displayed at the bottom of the applicable columns.

Code descriptions are displayed at the bottom of the report.

**Attendance Second half of Summer Term Report**

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

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

Totals are displayed at the bottom of the applicable columns.

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

**Absentees Report**

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

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

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

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

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

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

Address Details Report

Report Criteria: Pupils on-roll on census day.

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

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

School Dinner Taken Report

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

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

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

Free School Meal Eligibility Report

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

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

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

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

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

**Early Years Report**

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

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

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

**Post Looked After Arrangements Report**

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

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

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

**Generating Detail Reports**

**Selecting a Single Detail Report**

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

Selecting Multiple Detail Reports

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

The report(s) are saved automatically in the folder specified in the Census Return for Autumn Term browser.

Creating the Final Return

If you have not created a dry run for this census return, please follow the steps on page 30.

1. If the census file is not already open, click on Routines | Statutory Returns | School Census

You will see the following message

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

Panel 1 Census Details

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

Calculating the School Census Return

Only applicable if you are starting a new Census return

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

You will then see the following message:

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

2. When you are ready to calculate, click the Yes button to calculate all details. At this point, depending on the number of pupil/students in the school, there may be a short delay while details are calculated.

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

3. The return can be saved at any point by clicking the Save button.
Panel 2 School Information

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

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

![School Information Panel]

To check/amend the school details click on the School Detail button.

INFORMATION FOR ACADEMIES

Select Academies from the School Type and School Governance drop down lists. Academies should ensure that the Previous School Name and the Date Name Changed are entered if applicable. If the name did not change when the school converted to Academy status, enter the school’s current name in the previous name field.

If the Establishment number and URN Number has changed, please also complete the Previous Estab Number and Date Number Changed, Previous URN Number and Date Number Changed.

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

Panel 3 Hours for Early Years

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

If you need to update this information, click on the Edit button then OK button. You will now be able to edit/update the Hours for early Years. Please see page 18 for further information. Amend and Save the amended data as necessary.
Panel 4 Class Type

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

If you need to update this information, click on the Edit button then OK button. You will now be able to edit/update the Class Types. Please see page 17 for further information. Amend and Save the amended data as necessary.

Panel 5 Top-Up Funding

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

If you need to update this information, click on the Edit button then OK button. You will now be able to edit/update the Top-Up Funding. Please see page 22 for further information. Amend and Save the amended data as necessary.

Panel 6 Post Looked After Arrangements

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

If you need to update this information, click on the Edit button then OK button. You will now be able to edit/update the Post Looked After Arrangements. Please see Page 23 for further information. Amend and Save the amended data as necessary.

Panel 7 School Dinner Taken

Entering School Dinners Taken Details

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

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

Calculate From Attendance will populate the School Dinner Taken column based on whether a pupil is has been marked present on census day. If the pupil did not take a school provided dinner the tick should be removed from the School Dinner Taken column.

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

Calculate From Dinner Money will populate the School Dinner Taken column based on whether a pupil has been marked as taking a dinner on census day in the SIMS Dinner Money.
The Reference Date defaults to 06/10/16 but can be amended only if the situation on census day is abnormal.

**Panel 8 Attendance Panel**

**Attendance Errors**

Attendance data for all statutory school aged pupils will automatically be entered directly into the School Census return. You must have made sure that attendance data is up-to-date for the period of 17/04/17 to 31/07/17 as this return collects attendance data for Terms 5 and 6.

Once the information is complete click on **Save** to save the details of the Autumn 2017 School Census return so far.

**Helpful Hint**

You can **save** and **exit** then validate your School Census return at a later stage. Alternatively, click **Create & Validate** at the top of the screen if you wish to continue. Instructions on Validating your return are shown on the next page.
Schools not using SIMS Attendance

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

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

1. To filter the display of pupils in the Attendance panel, select Year Group, Registration Group or Enrolment Status from the Group By drop-down list.
2. Alternatively, select Group by None to display a list of all pupils.
3. To sort the displayed data by surname, forename, year group, registration group or enrolment status, click the appropriate column header.
4. For each pupil, enter the correct attendance numbers in the T Poss Sessions, T Auth Absences and T Unauth Absences columns for each of the collection periods.
5. To clear the attendance information and check for additional pupils, click the Check for additional pupils & zero totals button.

**WARNING:** If the Check for additional pupils & zero totals button is clicked, any attendance data entered manually is lost.
Creating and Validating the Return

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

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

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

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

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

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

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

![Validation Errors Summary](image)

<table>
<thead>
<tr>
<th>Type</th>
<th>Sequence</th>
<th>Message</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>F</td>
<td>1820</td>
<td>UPI missing.</td>
<td>Name: Abraham, Janel Date of Birth: 20</td>
</tr>
<tr>
<td>F</td>
<td>1852</td>
<td>Child's Funded Hours not provided or out of the range</td>
<td>Name: Barrett, Anthony Date of Birth: 20</td>
</tr>
<tr>
<td>F</td>
<td>1852</td>
<td>Child's Funded Hours not provided or out of the range</td>
<td>Name: Clover, Frederick Date of Birth: 20</td>
</tr>
<tr>
<td>F</td>
<td>1858</td>
<td>Child's Funded Hours not provided or out of the range</td>
<td>Name: Reed, Andrew Date of Birth: 20</td>
</tr>
<tr>
<td>Q</td>
<td>1820Q</td>
<td>Please check: duplicate pupil records with the same</td>
<td>Name: Alkinson, Ben Date of Birth: 2003</td>
</tr>
</tbody>
</table>

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

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

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

These should have been checked as part of the Dry Run process. Please refer to page 34 for further help

Producing the Summary report

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

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

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

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

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

Authorising the Return

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

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

Once a return has been authorised it is not possible to edit any of the details on it. It is possible to reprint the summary sheet. (If the return needs amending a new one can be created and copied from the old one – see page 50).
3. Click on **Yes**.

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

5. Click on the **Continue** button.

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

6. **Close** the screen.

7. Click on the **OK** button

   If the return needs amending after Authorisation it will have to be recreated from a copy of the original one – see Page 50.
Deleting a School Census Return

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

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

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

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

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

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

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

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

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

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

The screens below are example screens only.

Click on the Search button.

Highlight the return and click on the Copy button.

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

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

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

You will now need to run AnyComms as normal (see page 48) to send the re-created return and the summary file to the Local Authority or upload the new file to the Secure Website.
Checking Free School Meals Eligibility

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

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

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

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

If you need to make changes to Free school meal data
1. Search for then **double-click** the required pupil to display the **Pupil Details** page.
2. Click the **Dietary** hyperlink to display the **Dietary** panel.
3. Ensure the minimum of a **Start Date** is displayed in the **Eligible for Free Meals** panel. If a new record is required, click the adjacent **New** button to display the **Add Student Free Meal Details** dialog.
4. Enter the **Start Date** (and **End Date** if applicable) for the free meal period, as supplied by your Local Authority.

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

6. Notes can be entered, if required.

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

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

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

**Checking Special Educational Needs Information**

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

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

1. Select **Focus | Pupil | Special Educational Needs** to display the Find SEN Student browser.

2. Select the required **SEN Status** from the drop-down list. Additional search criteria can be selected, if required, e.g. **Year Group**.
3. Click the **Search** button to display a list of pupils who match the criteria.

![Find SEN Student](image)

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

![Student SEN details: Tarmwar Abdullah](image)

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

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

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

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

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

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

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

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

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

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

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

Run the Exclusions Report

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

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

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

Any missing exclusions must be added.

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

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

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

4. Select the exclusion Type and the Reason for the exclusion from the respective drop-down lists.

5. Enter the exclusion Start Date and End Date. Alternatively, click the appropriate Calendar button then select the required date.
6. Select a **Start Time** and **End Time** from the drop-down list, i.e. **AM** or **PM**.

7. Click the **Calculate** button to populate the **Length School Days** field automatically.

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

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

9. Click the **Save** button to save the exclusion.
Recording Leavers and Re-Admissions

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

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

Recording a Leaver

The Date of Leaving is collected for all schools.

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

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

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

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

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

### Re-Admitting a Pupil

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

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

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

5. Click the **Yes** button if you are certain that this is the pupil who should be re-admitted. Their details are displayed on the **Pupil Details** page.
6. Complete the mandatory fields (**Date of birth**, **Gender**, **Year Group**, **Enrolment Status**, **Year Taught In** and **Admission Date**) and check any other details that may have changed since they were last on-roll, such as their address.
7. Check that the original **UPN** is displayed.
8. Click the **Save** button to re-admit the pupil.

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

### Deleting Unwanted Pupil Records

If there are pupils who have been entered in error (such as duplicates), ensure that they are deleted so that they are not included in the return. This is achieved via **Routines | Pupil | Delete Pupil.** After selecting the required pupil, you have the opportunity to review and print their information before deleting their record permanently. You should contact **LGSS – Business Systems Team on 01604 366300** if you have to permanently delete a pupil.

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

### Checking National Curriculum Year Groups

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

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

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

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

- via individual pupil records (Focus | Pupil | Pupil Details).
Checking the Pupil’s Year Taught In Record

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

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

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

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

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

Checking Enrolment Status and Admission Date

1. Select Focus | Pupil | Pupil Details to display the Find Student browser.
2. Search for then double-click the name of the required pupil to display the Pupil Details page.
3. Click the Registration hyperlink to display the Registration panel.
4. Check the pupil’s **Enrolment Status.** Select the correct enrolment status from the drop-down list, if required.

5. Ensure that the **Admission Date** is correct. Edit the date or click the **Calendar** button and select a different date, if required.

6. Click the **Save** button.

### Checking Unique Pupil Numbers

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

**Using the Quick Search facility**

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

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

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

3. Click the **Registration** hyperlink to display the **Registration** panel.
UPNs should be entered in the UPN field. Ensure that the format is valid (the field will turn red if invalid).

- **Permanent UPNs** are issued to a new pupil only when it is believed that they have never previously been allocated a UPN or to replace a temporary UPN.

- **Temporary UPNs** are issued to a pupil when the permanent UPN is not known to the school, e.g. awaiting transfer file/applicant’s information. A temporary UPN can be recognised by the letter after the UPN number, e.g. H82020010701A.

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

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

6. Click the OK button to return to the Registration panel.

7. Click the Save button to save any changes. The UPN is generated automatically when the record is saved.
Updating Cultural Information

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

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

A First Language other than English should be recorded where a pupil was exposed to the language during early development and continues to be exposed to this language at home or in the community.

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

Using the Quick Search facility

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

A list of people recorded in SIMS who match the search criteria of missing First Language.

Those pupils with a missing First Language are displayed.
Editing the pupils record

9. Select Focus | Pupil | Pupil Details to display the Find Pupil browser.

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

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

12. Select the pupil's First Language from the drop-down list.

13. Click the Save button.

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

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

16. Choose the required Nationality and click OK.

For any pupil whose First language is not English, a level is required for their Proficiency in English.
17. To add a Proficiency in English (Not collected until the spring census return), click **New**

![Add Proficiency in English](image)

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

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

**Changing the History**

![History Details](image)

This screen shows you at what point data was entered onto the system and the date the pupil was admitted. All the orange bars need to completely fill the white space (i.e., the date of admission).

1. **Double click** on the orange bar to be changed. You may need to scroll down the next screen to see the orange bar.
2. Again **double click** on the orange bar to be changed.

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

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

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

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

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

The attendance data collected in this school census return includes:

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

Attendance data is captured automatically for the return, provided that there are no missing marks.

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

Dealing with Missing Marks

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

7. Enter the appropriate codes within the **Mark** column and **Save**.