

Preparing for the School Census Summer 2011 Return

English Primary, Nursery and Special Schools

Contents

School Census Summer 2011 Preparation Check List	1
01 Introduction.....	3
Introduction.....	3
How has the School Census Summer Return Changed Since Last Year?	3
Permissions Required	4
What Version of SIMS is Required?	5
Importing Revised Files for Validation and Reports.....	5
Before Importing the Revised Files	6
Importing the Revised Files.....	6
Overview of the School Census Summer 2011 Return Process	9
02 Carrying out a Dry Run.....	11
Why Carry out a Dry Run?	11
The Dry Run Process	11
Creating and Validating the Return	12
Producing Detail Reports	15
03 Preparing School Level Information	17
Checking Establishment Details	17
Checking Telephone and Email Information.....	19
04 Preparing Pupil Level Information.....	21
Checking/Correcting Pupil Details.....	21
Updating Information Using the Bulk Update Process.....	22
Checking/Correcting a Pupil's Basic Details.....	26
Recording a Pupils Change of Surname	27
Checking Enrolment Status, Admission Date and Boarder Status	27

Checking/Correcting UPNs.....	28
Checking/Correcting Unique Learning Numbers	30
Checking/Correcting Part-Time Pupil Information	31
Checking/Correcting the National Curriculum Year Group	32
Checking Eligibility for Free School Meal	38
Checking First Language Information.....	40
Checking/Correcting Connexions Assent	40
Recording Leavers and Re-Admissions	42
Recording a Leaver.....	42
Re-Admitting a Pupil	43
Checking/Correcting Special Educational Needs (SEN) Information....	44
Adding Gifted and Talented Pupils	45
Preparing Exclusions Information	47
Recording an Exclusion	48
Preparing Attendance Information	50
Preparing Class Information (Checking Class Types)	50
Resetting All Class Types	52
Identifying which Pupils have no Class Type Specified.....	52
Checking/Correcting Hours at Setting Information	52
Identifying which Pupils have no Entries for Hours at Setting	54
Deleting Unwanted Pupil Records.....	55
05 What Next?.....	57



School Census Summer 2011 Preparation Check List

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

Complete	Description
<input type="checkbox"/>	Check with your System Administrator/Manager that you have the appropriate permissions to run the School Census and record associated data. For more information, please see <i>Permissions Required</i> on page 4.
<input type="checkbox"/>	Upgrade to the SIMS 2011 Spring Release (SIMS 7.138) or later as soon as possible to enable dry runs to be carried out. For more information, please see <i>What Version of SIMS is Required?</i> on page 5.
<input type="checkbox"/>	Check with your System Administrator/Manager that the latest fileset version has been imported. For more information, please see <i>Importing Revised Files for Validation and Reports</i> on page 5.
<input type="checkbox"/>	Carry out a dry run to determine what information needs updating. For more information, please see <i>Carrying out a Dry Run</i> on page 11.
<input type="checkbox"/>	Check School Level information. For more information, please see <i>Preparing School Level Information</i> on page 17.
<input type="checkbox"/>	Check the pupils' basic details. For more information, please see <i>Checking/Correcting a Pupil's Basic Details</i> on page 26.
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Check the pupils' various registration details. For more information, please see: <i>Checking Enrolment Status, Admission Date and Boarder Status</i> on page 27 <i>Checking/Correcting UPNs</i> on page 28 <i>Checking/Correcting Unique Learning Numbers</i> on page 30 (applicable to Special schools only) <i>Checking/Correcting Part-Time Pupil Information</i> on page 31 <i>Checking/Correcting the National Curriculum Year Group</i> on page 32
<input type="checkbox"/>	Check free school meal information. For more information, please see <i>Checking Eligibility for Free School Meal</i> on page 38.
<input type="checkbox"/>	Check first language information (not applicable to Nursery schools). For more information, please see <i>Checking First Language Information</i> on page 40.

01 | Introduction

Introduction

This preparation guide has been produced to help identify the most common tasks that need to be carried out before running the School Census Summer 2011 Return. It is applicable to all maintained Primary, Nursery, Special schools and Academies (where applicable to these school types).

Information in this guide, which relates to a specific school type only, e.g. Special schools, is indicated where applicable.



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

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

Changes since last year include the following:

School Information

Routines | Statutory Returns | School Census

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

Hours at Setting

Tools | Statutory Return Tools | Hours at Setting

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

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

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

- If Early Years Attendance Patterns (*applicable to Primary schools only*) have been defined (via **Focus | Pupil | Pupil Details**) for pupils who are receiving free nursery care, then Hours at Setting can be calculated automatically.

This can be achieved by clicking the **Update Hours at Setting** button accessed via **Tools | Statutory Return Tools | Hours at Setting** or via the **Update Hours at Setting for 2 (3 or 4) year olds** button in the **Hours at Setting** panel.

Authorising the Return

Routines | Statutory Returns | School Census

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

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

- On completion of the authorisation process, the Summary report is generated and displayed in your web browser from where it can be saved for future reference or printed.

Permissions Required

The following permissions are applicable to School Census return users.

Producing the Return

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

Editing and Preparing Data

Users editing and preparing data must have permissions to access other areas of SIMS, e.g. pupil details, school details, etc. These users will need to be members of any of the following user groups in System Manager:

- Administration Assistant
- Admissions Officer
- School Administrator.

Importing Revised Files for Validation and Reports

The Import Fileset functionality is provided to enable updates to the Validation Errors Summary and the Summary report (derived from files supplied by the Statutory Body), and detail reports (provided by SIMS) to be imported into SIMS between the SIMS releases. To use the Import Fileset functionality (via **Tools | Setups | Import | Fileset**), you must be a member of one of the following user groups in System Manager:

- Personnel Officer
- Returns Manager
- System Manager.

Where to find More Information about Permissions

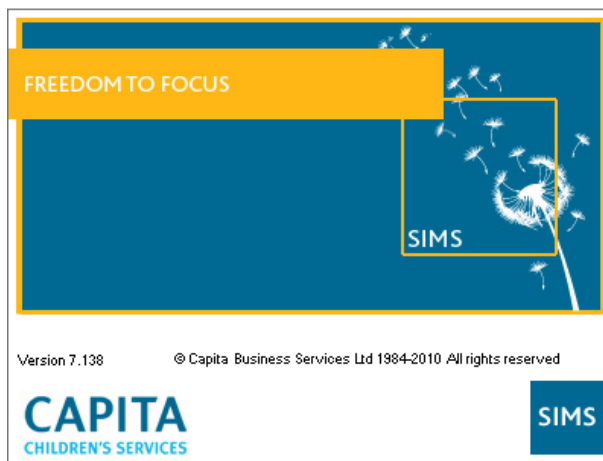
Please see your System Administrator/Manager if you are not sure whether you have the required permissions. For more information, please refer to the *System Manager* handbook.

What Version of SIMS is Required?

In order to run the School Census Summer 2011 Return, you must have the SIMS 2011 Spring Release (7.138) or later installed.

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

The version should read 7.138 or later.



Importing Revised Files 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 detail reports to enable the checking of data used to generate the return. These report files are initially installed automatically during the SIMS release 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, by the Personnel Officer, Returns Manager or System Manager between the SIMS releases.

IMPORTANT NOTE: The report files are not always updated, therefore, it is not always necessary to use the Import Fileset routine. You will be advised if you need to import a fileset.

If revised file(s) are supplied, the fileset will be available as a .ZIP file, which should be downloaded from www.capitaess.co.uk (then choose Northamptonshire from the Local Authority drop down at the top of the screen), unzipped, then imported into the SIMS Document Management Server (DMS) via the **Tools | Setups | Import Fileset**. Ensure that the DMS is configured correctly before attempting to import the files.



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

Type	Sequence	Message	Location	Solution
F	1542	Pupil actual year group not a recognised value	UPN : D820200106043 Surname : Smiles Forename : Sophie	# Go to Focus Student Information panel and ex...
F	11035	NYearsActual must be present	UPN : D820200106043 Surname : Smiles Forename : Sophie	# Go to Focus Student Information panel and ex...
Q	6009Q	Please check: Sessions Attended is 0	UPN : L820200106096 Surname : Bradshaw Forename : Jonn	# Go to Focus Attendance (or Lesson Monitor) Deal with Missi...
Q	6009Q	Please check: Sessions Attended is 0	UPN : Z820200106102 Surname : Flowers Forename : Lilly I	# Go to Focus Attendance (or Lesson Monitor) Deal with Missi...
Q	6009Q	Please check: Sessions Attended is 0	UPN : W820200106100 Surname : Cerveira Forename : Pedi	# Go to Focus Attendance (or Lesson Monitor) Deal with Missi...
Q	6009Q	Please check: Sessions Attended is 0	UPN : A820200106097 Surname : Bukolt Forename : Krystal I	# Go to Focus Attendance (or Lesson Monitor) Deal with Missi...

Before Importing the Revised Files

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

If the connection is unsuccessful, check the following details:

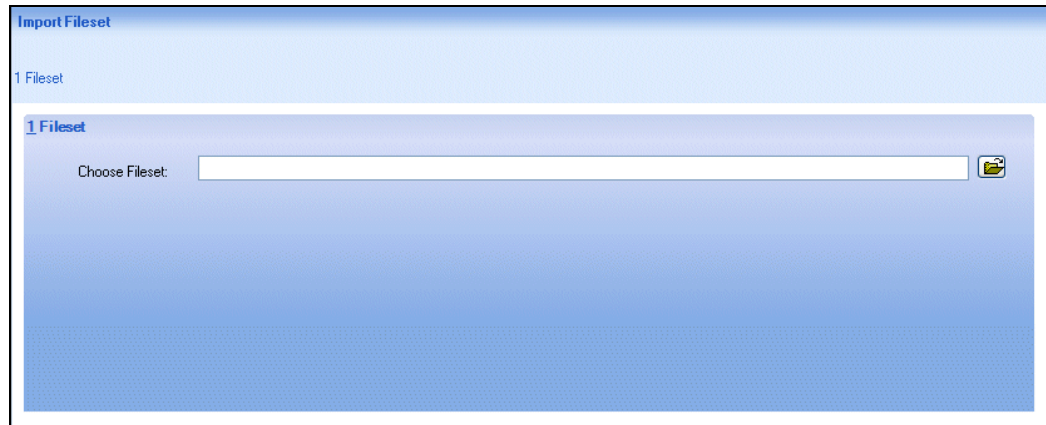
- The **Protocol** field defaults to **http** and should not be edited.
- The **Computer name** should be the name/number of the PC on which the DMS is installed.
- The **Port** number is usually 8080. The number must be between 0 and 65535.
- The **Active** check box must be selected, indicating that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

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

Importing the Revised Files

1. If revised files are supplied, download the required .ZIP file from from www.capitaess.co.uk (then choose Northamptonshire from the Local Authority drop down at the top of the screen) to a folder of your choice. Unzip the .ZIP file to the folder of your choice.

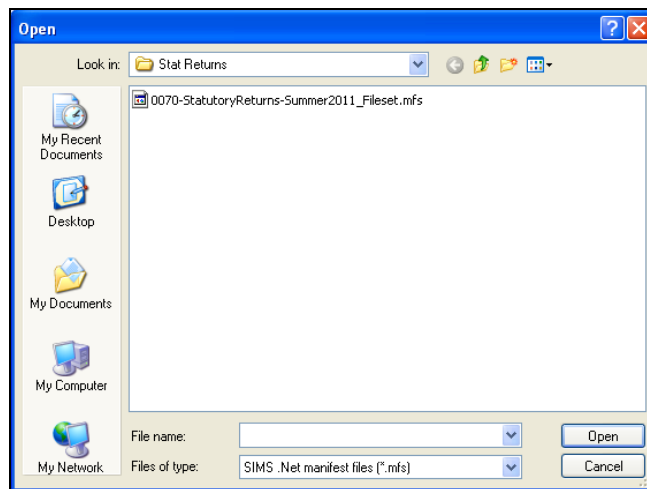
- In SIMS, select **Tools | Setups | Import Fileset** to display the **Import Fileset** page.



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



NOTE: The following graphics show example data only.

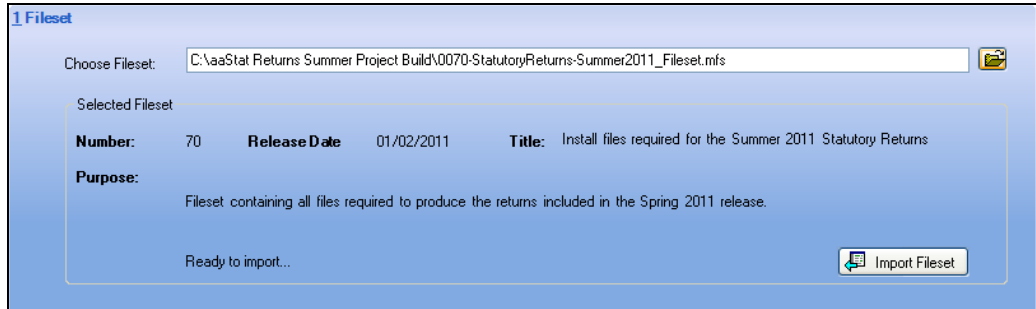


- Navigate to the location of the downloaded fileset. The file name is made up of the following data fields: <Fileset Number>-<Census Name><Term and Year>Fileset.mfs.

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

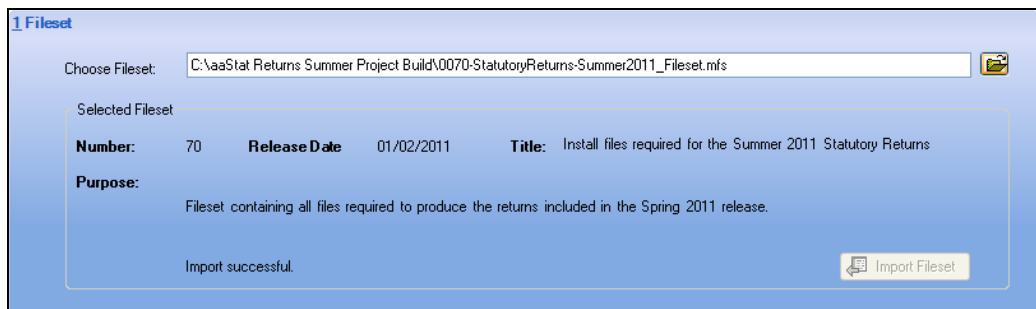


IMPORTANT NOTE: *If more than one .MFS file is displayed in the Open dialog, care should be taken to select the correct file.*



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

- Click the **Import Fileset** button to import the fileset into the DMS. When the import process is finished, **Import complete** is displayed at the bottom left-hand side of the **Fileset** panel.



- After installing the fileset, close SIMS then re-open to ensure that the new data takes effect.
- Run the return in the usual way.



NOTE: *A fileset can be re-imported, e.g. if during the previous import the data corrupted, if required.*

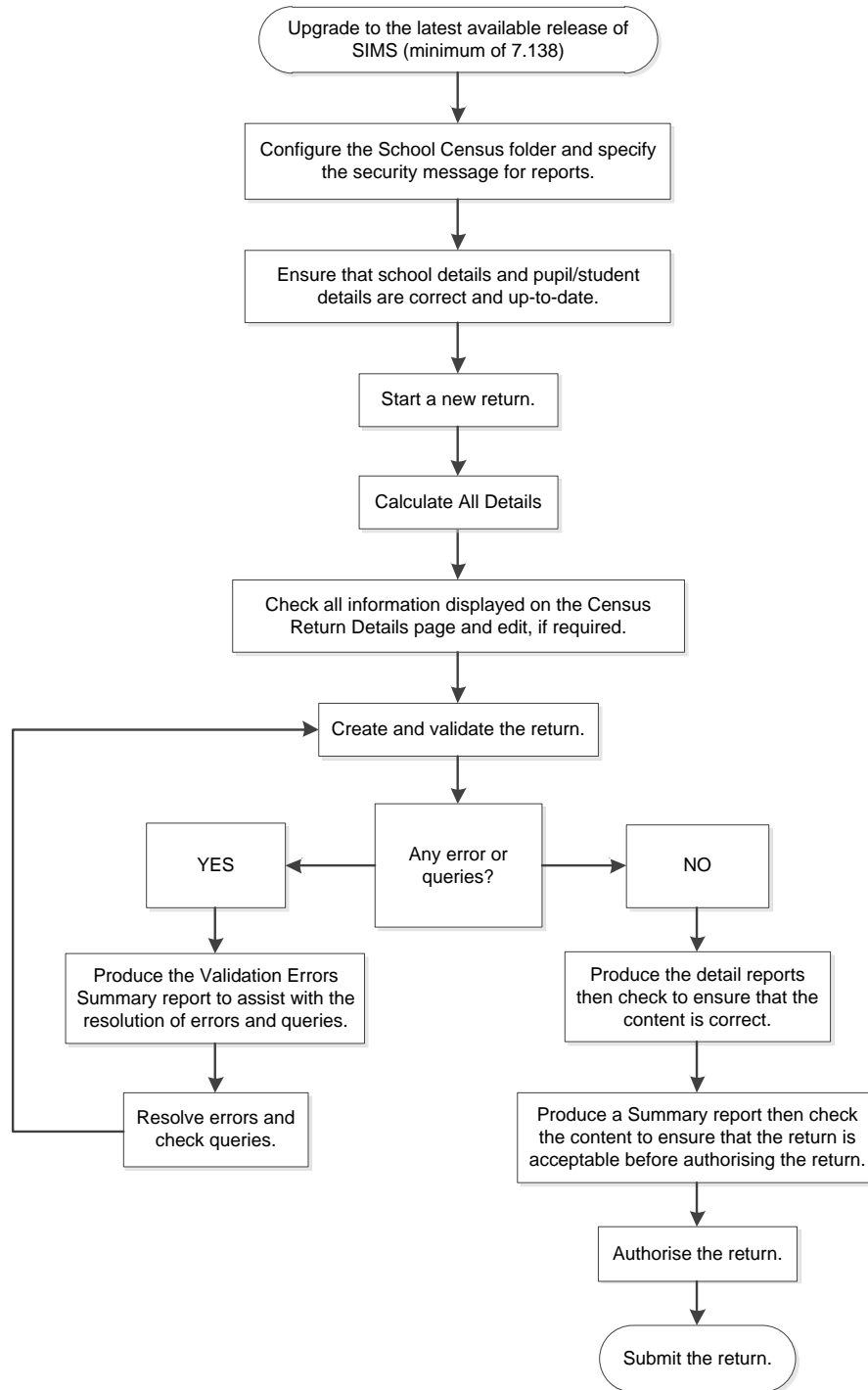
Overview of the School Census Summer 2011 Return Process

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

1. Upgrade to the SIMS 2011 Spring Release (SIMS 7.138) or later.
2. Carry out one or more dry runs to identify any errors that may exist in your data.
3. Ensure that the relevant pupil and school data exists in SIMS and that it is complete and correct. Use Bulk Update in SIMS to correct missing/invalid data as required.
4. Complete the required information on the **Census Return Details** page.
 - Key in non-pupil data.
5. Create and Validate the return.
6. Resolve any errors/queries then create and validate the return again. Repeat these processes until you are satisfied that the content of the return is correct.

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

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



02 | Carrying out a Dry Run

Why Carry out a Dry Run?

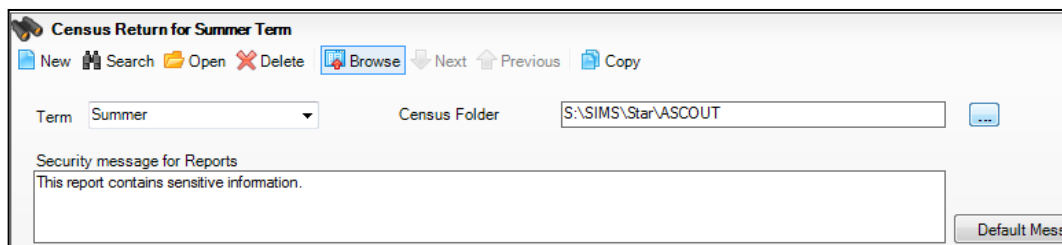
When the SIMS 2011 Spring Release (SIMS 7.138) has been installed, you can carry out one or more dry runs of the School Census Summer 2011 Return.

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

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

The Dry Run Process

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



2. Ensure the Census Folder states **n:\sims\star\ascout** where **n:** is the drive letter of your sims directory (usually **c:** or **s:**).

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

- By default, the return **Description** is displayed as **School Census Summer Return 2011**. Edit the **Description** to any name that will clearly distinguish this dry run from the actual return, which will be generated later, e.g. SUMMER11Test.
- In the **School Information** panel, click the **Calculate All Details** button to extract the required information from SIMS and display the results in the various panels of the **Census Return Details** page.
- If there is any missing or invalid data, an error message is displayed in the Status Bar. This data must be added/corrected before you can create and validate the return.



More Information:

Detailed information about completing the individual panel on the **Census Return Details** page is available in the Summer 2011 School Census Primary, Infant and Junior School Completion notes or the Summer 2011 School Census Special School notes.

Creating and Validating the Return

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

Type	Sequence	Message	Location	Solution
F	1140	No completion times provided		# Go to link "Survey Co
F	1542	Pupil actual year group not a recognised value	UPN : D820200106043 Surname : Smiles Forename : Sophie	# Go to Focus Student
F	11017	CompleterRole must be present	CompleterRole :	# Go to link "Survey Co
F	11018	Hours must be present	Hours :	# Go to link "Survey Co
F	11035	NCYearActual must be present	UPN : D820200106043 Surname : Smiles Forename : Sophie	# Go to Focus Student Student Details Registration panel an
Q	6009Q	Please check: Sessions Attended is 0	UPN : F820200106106 Surname : Gorman Forename : Micha	# Go to Focus Attendance (or Lesson Monitor) Deal with N
Q	6009Q	Please check: Sessions Attended is 0	UPN : Z820200106102 Surname : Flowers Forename : Lilly	# Go to Focus Attendance (or Lesson Monitor) Deal with N
Q	6009Q	Please check: Sessions Attended is 0	UPN : W820200106100 Surname : Cerveira Forename : Pedr	# Go to Focus Attendance (or Lesson Monitor) Deal with N
Q	6009Q	Please check: Sessions Attended is 0	UPN : A820200106097 Surname : Bukolt Forename : Kystal	# Go to Focus Attendance (or Lesson Monitor) Deal with N
Q	6009Q	Please check: Sessions Attended is 0	UPN : L820200106096 Surname : Bradshaw Forename : Jorin	# Go to Focus Attendance (or Lesson Monitor) Deal with N

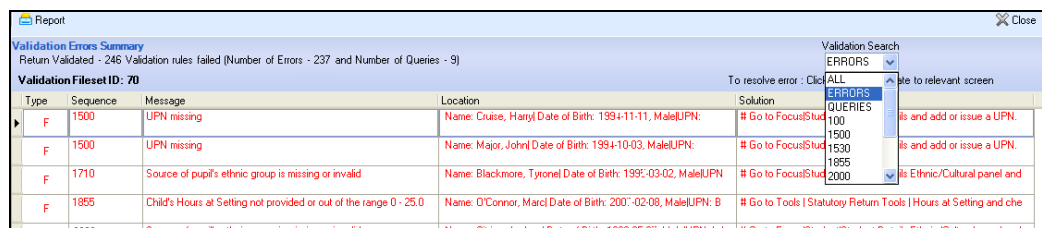
The **Validation Errors Summary** panel header displays the number of errors and queries found during the Create and Validate process. The **Validation Fileset ID**, which indicates the version of the DfE fileset currently in use, is also shown (for information only).

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

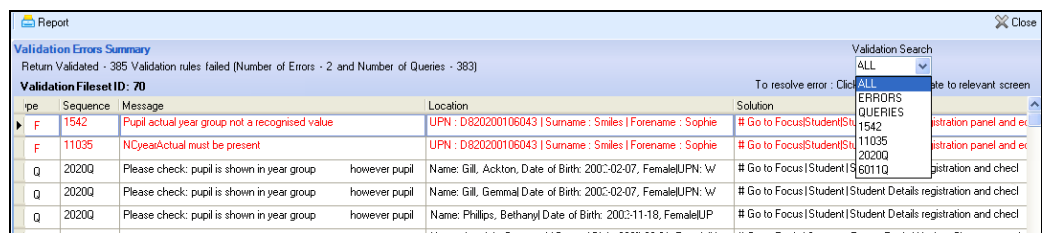
Column	Description
Type	Displays the type of validation rule: Failure (F displayed in red) indicates an error, which <u>must</u> be corrected. Query (Q displayed in black) indicates that there are unusual data conditions. These should be considered and corrected, if necessary.
Sequence	Shows the error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

To assist in the resolution of any errors and queries:

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



- 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.



- When the pointer is hovered over a **Message**, **Location** or **Solution** cell, hover help displays the entire content of that cell.
- When the pointer is hovered over an error or query row, it changes to a hand if a hyperlink is available to the area of SIMS where the problem can be checked.

Type	Sequence	Message	Location	Solution
F	1500	UPN missing	Name: Smiles, Sophie Date of Birth: 2000-03-03, FemaleUPN:	# Go to FocusStudent Student Details and add or issue a UPN.
F	1855	Child's Hours at Setting not provided or out of the range 0 - 25.0	Name: O'Connor, Marcel Date of Birth: 2007-02-08, MaleUPN: B	# Go to Tools Statutory Return Tools Hours at Setting and che
Q	1330Q	Please check: Free School Meals taken equals zero. Your scho		# Check number of free school meals in Census Details General
Q	1601Q	Please Check: Pupil's age is out of range for scPlease check: Free School Meals taken equals zero. Your school has one or more pupils who are eligible for Free School Meals. and check pupil's date of		
Q	2100Q	Please check: More FT nursery pupils than number on nursery c		# Check Part time status of pupils ->Go to FocusStudent Student
Q	2360Q	Please check: Pupil record with no address detail	Name: Douglas, David Date of Birth: 2002-02-05, MaleUPN: A	# Go to FocusStudent Student Details Address and addresst



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

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

- Change the order of the summary by clicking the appropriate column heading. If required, change the width of the columns by dragging the dividing line between the column headings until the required size is achieved.
- View a summary of errors/queries by clicking the **Report** button, located above the **Validation Errors Summary** panel. The summary is displayed in a web browser, e.g. Windows® Internet Explorer, from where it can be printed.

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

The errors and queries are displayed until they are resolved and the Create and Validate process is run again. Resolve as many errors and check as many queries as possible then revalidate the return details. Continue to resolve failures and revalidate the return as many times as necessary.

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

Many of the pupil related errors generated can be fixed quickly using Bulk Update functionality (**Routines | Pupil | Bulk Update**). For more information, please see *Updating Information Using the Bulk Update Process* on page 22.



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

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

Producing Detail Reports

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

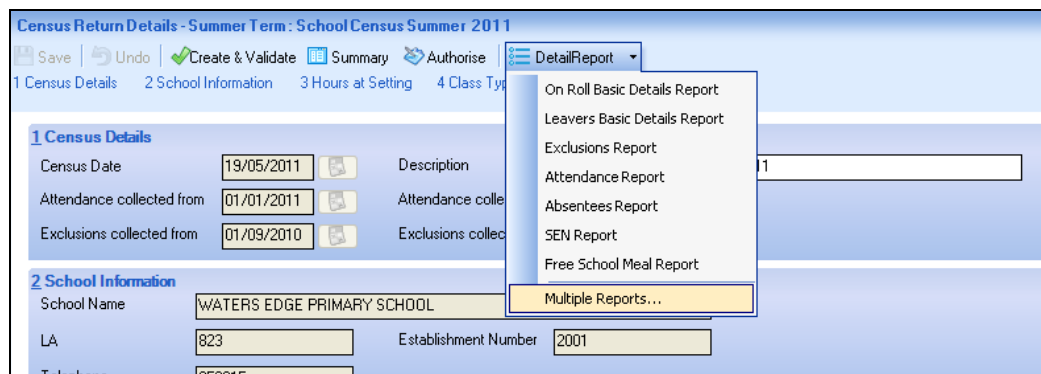
The following reports are currently available:

- On Roll Basic Details Report
- Leavers Basic Details Report (not applicable to Nursery schools)
- Exclusions Report (not applicable to Nursery schools)
- Attendance Report (applicable to Primary schools only)
- Absentees Report (applicable to Primary schools only)
- SEN Report
- Free School Meal Report.

Generating Detail Reports

To select a single detail report:

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



To select multiple detail reports:

1. Select **Multiple reports...** from the bottom of the **Detail Report** drop-down list to display the **Detail Reports** dialog. By default, all detail reports are selected.
2. If any reports are not required, deselect the associated check box.
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 Summer Term** browser, e.g. S:\SIM\STAR\ASCOUT.



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

Completed

03 | Preparing School Level Information

Checking Establishment Details

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

- **School Name**
- **School Type**
- **School Governance**
- **Intake Type**
- **Gender on entry to school** (applicable to Special schools only)
- **Gender on entry to 6th form** (applicable to Special schools only).

The following read-only items are also collected for the School Census Summer 2011 Return. Please contact your Local Support Unit if the information displayed is incorrect.

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

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

1 Establishment

School Name: WATERS EDGE PRIMARY SCHOOL

LA: 823 Central Bedfordshire

Establishment Number: 2001

Unique Reference Number: [Empty]

School Phase: Primary

School Type: Infant and Junior School 5-11

School Governance: Community

Intake Type: Comprehensive

Boarding Pupils:

Nursery Class:

Special Class or Unit:

Head Teacher: Mrs Gillian Grosvenor

Main Contact: Mrs G Grosvenor

Curriculum Years: N2, 6

Pupil Genders: Coeducational

Gender on entry to school: Coeducational

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

Extended Services:

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

No. of Childcare Places: 0

No. of Childcare Nursery Places: 0



3. Ensure that the **School Name** has been entered correctly.
4. Ensure that the **School Type**, **School Governance** and **Intake Type** have been selected correctly.
5. Check the entries in the **Curriculum Years** fields. If the lowest and highest National Curriculum years are incorrect, please contact dotict helpdesk on 01604 824999.
6. Ensure that the **Gender on entry to school** and **Gender on entry to 6th form** are selected correctly. (applicable to Special schools only.)
7. Click the **Save** button to save any changes, if applicable.

Completed

Checking Telephone and Email Information

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

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

3 Contact Details			
Telephone	<input type="text" value="01234 852015"/>	Fax	<input type="text" value="01234857898"/>
Email	<input type="text" value="school@we.com"/> 	Website	<input type="text" value="http://www.wateredgeschool.co.uk"/> 

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

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

Completed

04 | Preparing Pupil Level Information

Checking/Correcting Pupil Details

Before beginning the School Census return, ensure that all current pupils are included 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 and boarder status (not a border) are entered before they are recorded as a leaver.

- any duplicate or unwanted pupil records have been deleted.
- pupil basic details, e.g. UPNs, names, date of birth, etc. are entered correctly in SIMS.
- part-time details have been checked/updated.
- the National Curriculum Year Group (Year Taught In) is correct.
- free school meal eligibility has been updated.
- Special Educational Needs information is up-to-date.
- Hours at Setting are up-to-date.
- first language information has been recorded (not applicable to Nursery schools).
- Connexions assent has been recorded/updated (applicable to Special schools only).
- exclusions information has been updated (not applicable to Nursery schools).
- the Unique Learner Numbers (ULNs) are entered for all pupils aged 14 and over (applicable to Special schools only).
- gifted and talented information has been recorded (or removed) for applicable pupils
- attendance records have been updated (applicable to Primary schools only).

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 functionality. For more information, please see *Updating Information Using the Bulk Update Process* on page 22.

If you have already upgraded to the SIMS 2011 Spring Release (SIMS 7.138), it is strongly recommended that one or more dry runs are carried out in order to identify the validation errors and queries that need to be resolved. For more information, please see *Carrying out a Dry Run* on page 11.

Updating Information Using the Bulk Update Process

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

This can be achieved by using the Bulk Update functionality available within SIMS. It 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 First Language recorded against their name. From the pupils found, a value can be assigned to all or several pupils. This prevents the need for manually entering/changing values for individual pupils.

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

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

The **Group Type** indicates the type of group to list while the **Group** enables the specific group of 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 8**.

If searching for missing information, select the particular data field from the **Group Type**, 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 and then selecting the required **Data Item**.

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

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

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

The screenshot shows a 'Bulk Update' interface with two main sections: 'Student Population' and 'Update Data Item'.
 In the 'Student Population' section:
 - 'Group Type' is set to 'Year Group'.
 - 'Group' is set to '<ANY>'.
 - 'Effective Date' is set to '15/11/2010'.
 In the 'Update Data Item' section:
 - 'Data Item' is set to 'First Language'.
 - 'Effective Date' is set to '15/11/2010'.

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 **First Language** types.

Bulk Update First Language - Year Group <ANY> (15/11/2010)

Save | Undo | Print | Help | Unpin | Close

1 Members

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



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

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

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

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

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

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

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

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

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

Bulk Updating Data for a Selection of Pupils

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

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

Checking/Correcting a Pupil's Basic Details

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

The following information is collected in the return:

- **Legal Forename** (mandatory information in SIMS)
- **Middle Names**
- **Legal Surname** (mandatory information in SIMS)
- **Former Surname**
- **Preferred Surname** (mandatory information in SIMS)
- **Gender** (mandatory information in SIMS)
- **Date of Birth** (mandatory information in SIMS).

1. Select **Focus | Pupil | Pupil Details** to display the **Find Pupil** browser.
2. Search for then double-click the name of the required pupil to display the **Pupil Details** page.

1 Basic Details

Legal Forename	Stanley	Photograph
Middle Name(s)	Craig	
Legal Surname	Ackton	
Preferred Surname	Ackton	
Preferred Forename	Stan	
Date of birth	18/12/2002	
Age	8 years, 5 months	
Gender	Male	
Birth Certificate Seen	<input checked="" type="checkbox"/>	

[+ Quick Note](#)

History

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

Recording a Pupils Change of Surname

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

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

Completed

Checking Enrolment Status, Admission Date and Boarder Status

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

- **Enrolment Status** (mandatory information in SIMS)
 - **Admission Date** (mandatory information in SIMS)
 - **Boarder Status**
1. Select **Focus | Pupil | Pupil Details** to display the **Find Pupil** browser.
 2. Search for then double-click the name of the required pupil to display the **Pupil Details** page.

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

2 Registration

Class: 3T0

Year Group: Year 3

Enrolment Status: Single Registration

Admission Date: 03/09/2007

Former UPN:

UPN: Z820200105076

House:

Year Taught In: Curriculum Year 3

Boarder Status: Not a Boarder

Admission Number: 000805

Attendance Mode: All day

Local UPN:

Part Time Details

Start Date	End Date
05/09/2008	04/09/2009

Early Years Attendance Patterns

Start date	End date	Mon	Tue	Wed	Thu	Fri	Sat	Sun

Buttons: New, Open, Delete, History

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

Completed

Checking/Correcting UPNs

The following information is collected in the return:

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

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

- Select **Focus | Pupil | Pupil Details** to display the **Find Pupil** Browser.
- 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.

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/student when the permanent UPN is not known to the school, e.g. awaiting transfer file/applicant's information. A temporary UPN can be recognised by the letter after the UPN number, e.g. H82020010701A.
4. If necessary, issue a new UPN by clicking the **Generate UPN** button adjacent to the **UPN** field to display the **Issue UPN** dialog.



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

Completed

Checking/Correcting Unique Learning Numbers

Applicable to Special schools only

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

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

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

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

1. Select **Focus | Pupil | Pupil Details** to display the **Find Pupil** 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.

The screenshot shows the 'Registration' panel with the following details:

- Class:** 3T0
- Year Group:** Year 3
- Enrolment Status:** Single Registration
- Admission Date:** 03/09/2007
- Former UPN:** (empty)
- UPN:** Z820200105076
- House:** (empty)
- Year Taught In:** Curriculum Year 3
- Boarder Status:** Not a Boarder
- Admission Number:** 000805
- Attendance Mode:** All day
- Local UPN:** (empty)

Part Time Details Table:

Start Date	End Date
05/09/2008	04/09/2009

Early Years Attendance Patterns Table:

Start date	End date	Mon	Tue	Wed	Thu	Fri	Sat	Sun
[Empty table with scroll bar]								

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

Completed

Checking/Correcting Part-Time Pupil Information

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

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

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

1. Select **Focus | Pupil | Pupil Details** to display the **Find Pupil** 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.



NOTE: The *Early Years Attendance Patterns* section is displayed for Primary schools only. If applicable, Primary schools should complete the *Early Years Attendance Patterns*, as this will help when updating *Hours at Setting*.

4. Check the details in the **Part Time Details** section. A minimum of a **Start Date** must be displayed.

- Part-time details can be added by clicking the **New** button to display the **Add Part-time Attendance** dialog.



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



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

Completed

Checking/Correcting the National Curriculum Year Group

The National Curriculum Year Group (Year Taught In) is the year group in which the 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 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 2010/2011):

Curriculum Year pupil would normally be taught in	Age Range	Date of birth range
N1	2 – 3	01/09/2007 to 31/08/2008
N2	3 – 4	01/09/2006 to 31/08/2007
R	4 – 5	01/09/2005 to 31/08/2006
1	5 – 6	01/09/2004 to 31/08/2005
2	6 – 7	01/09/2003 to 31/08/2004
3	7 – 8	01/09/2002 to 31/08/2003
4	8 – 9	01/09/2001 to 31/08/2002
5	9 – 10	01/09/2000 to 31/08/2001
6	10 – 11	01/09/1999 to 31/08/2000
7	11 – 12	01/09/1998 to 31/08/1999
8	12 – 13	01/09/1997 to 31/08/1998
9	13 – 14	01/09/1996 to 31/08/1997
10	14 – 15	01/09/1995 to 31/08/1996
11	15 – 16	01/09/1994 to 31/08/1995
12	16 – 17	01/09/1993 to 31/08/1994
13	17 – 18	01/09/1992 to 31/08/1993

There are three methods for checking this information in SIMS:

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

These methods are described in the following sections.

Checking Individual Records:

1. Select **Focus | Pupil | Pupil Details** to display the **Find Pupil** 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.

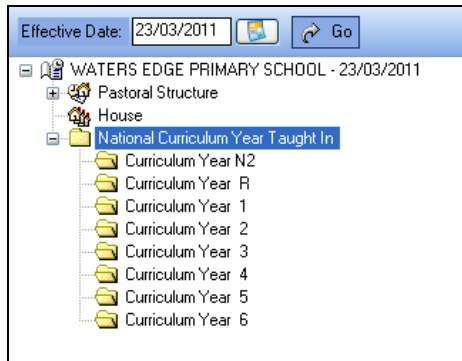
4. Check the **Year Taught In** to ensure that it is correct. If necessary, select the correct year from the drop-down list.

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

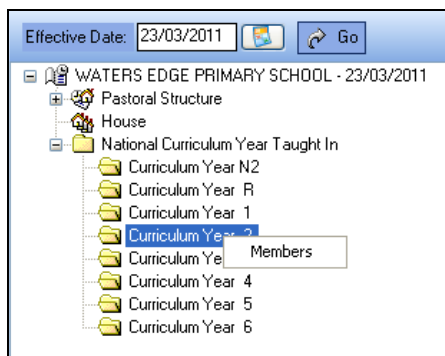
Checking the Year Taught In via the Pastoral Structure by Curriculum Year:

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

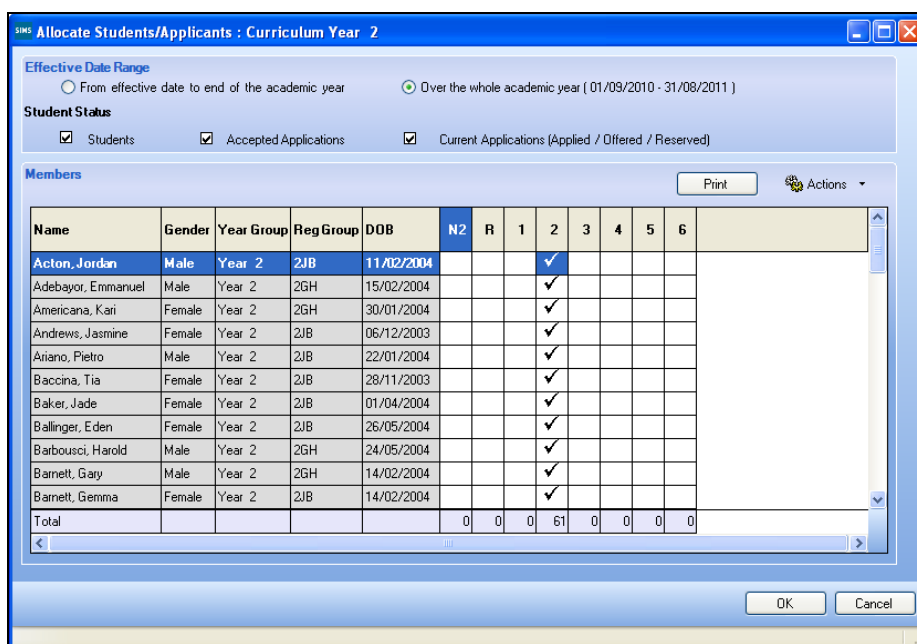
- Expand the **National Curriculum Year Taught In** folder by clicking the + icon or double-clicking the folder name. The curriculum years are displayed beneath.



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



The **Allocate Pupils/Applicants**: dialog is displayed.



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



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

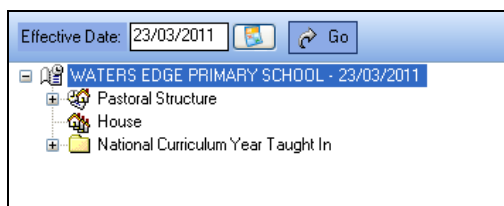
The following graphic shows that one pupil is taught in Year 9.

Name	Gender	Year Group	Reg Group	DOB	N2	R	1	2	3	4	5	6
Acton, Jordan	Male	Year 2	2JB	11/02/2004				✓				
Adebayor, Emmanuel	Male	Year 2	2GH	15/02/2004				✓				
Americana, Kari	Female	Year 2	2GH	30/01/2004				✓				
Andrews, Jasmine	Female	Year 2	2JB	06/12/2003					✓			
Ariano, Pietro	Male	Year 2	2JB	22/01/2004				✓				
Baccina, Tia	Female	Year 2	2JB	28/11/2003				✓				
Baker, Jade	Female	Year 2	2JB	01/04/2004				✓				
Ballinger, Eden	Female	Year 2	2JB	26/05/2004				✓				
Barbousci, Harold	Male	Year 2	2GH	24/05/2004				✓				
Barnett, Gary	Male	Year 2	2GH	14/02/2004				✓				
Barnett, Gemma	Female	Year 2	2JB	14/02/2004				✓				
Total					0	0	0	60	1	0	0	0

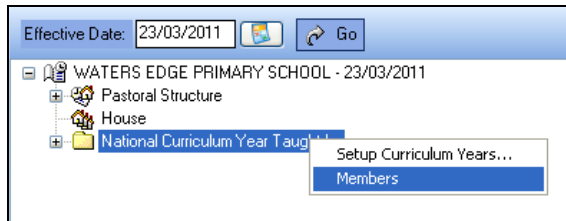
7. Make any further changes, then click the **OK** button to close the dialog.
8. Repeat for the other curriculum years, if required.
9. Click the **Save** button to save all the changes.

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

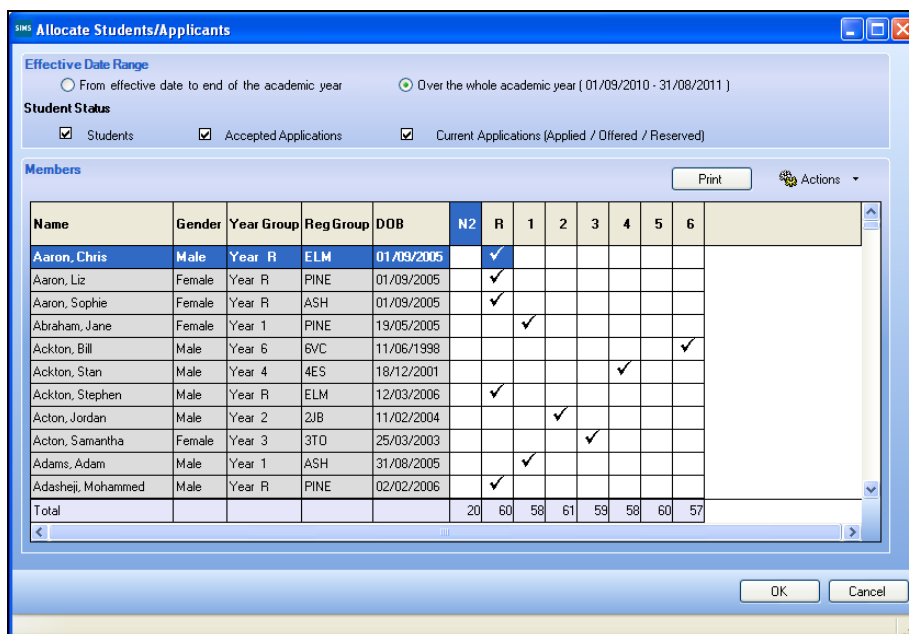
1. Select **Focus | School | Pastoral Structure | Current Structure** to display the **Current Academic Year Pastoral Structure** page.
2. Click the **Go** button.



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



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



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

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

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

Name	Gender	Year Group	Reg Group	DOB	N2	R	1	2	3	4	5	6
Abraham, Jane	Female	Year 1	PINE	19/05/2005								
Adams, Adam	Male	Year 1	ASH	31/08/2005								
Anderson, Neo	Male	Year 1	PINE	06/05/2005			✓					
Bains, Kirk	Male	Year 1	OAK	18/01/2005			✓					
Bellic, Nico	Male	Year 1	PINE	06/05/2005			✓					
Bellic, Roman	Male	Year 1	PINE	06/05/2005			✓					
Cadilia, Celia	Female	Year 1	PINE	07/05/2005			✓					
Carlson, Neville	Male	Year 1	PINE	06/08/2005			✓					
Charles, Harry	Male	Year 1	ASH	23/10/2004			✓					
Danny, Abbey	Female	Year 1	OAK	01/09/2004			✓					
Daskalos, Carl	Male	Year 1	PINE	24/11/2004			✓					
Total					20	60	58	61	59	58	60	57



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

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

Completed

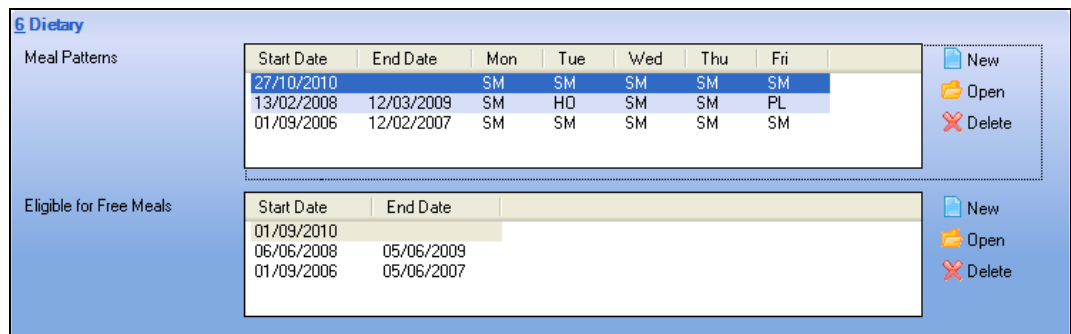
Checking Eligibility for Free School Meal

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

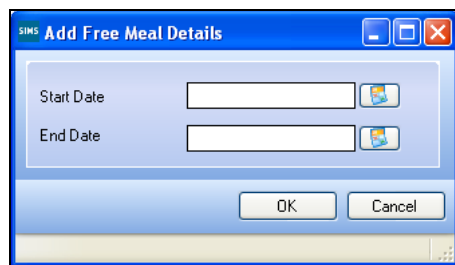
The free school meal eligibility **Start Date** must be entered, as this is the only mandatory information required for the School Census. An **End Date** is not mandatory for the census, but can be useful to enable reports to be produced that list when eligibility expires. To be included in the School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

The **Meal Patterns** section is for information purposes only and does not need to be recorded. It is perfectly acceptable for example, for a pupil to be eligible for free school meals, but to bring sandwiches (**PL** (packed lunch)) or to go home (**HO** (home)).

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



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



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

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

 **Completed**

Checking First Language Information

Not applicable to Nursery schools

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

- 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 in the home or in the community.
 - If the child was exposed to more than one language (which may include English) during early development, the language other than English should be recorded, irrespective of the pupil's proficiency in English.
1. Select **Focus | Pupil | Pupil Details** then select the required pupil.
 2. Click the **Ethnic/Cultural** hyperlink to display the **Ethnic/Cultural** panel.

3. If your Local Authority has asked you to record specific first languages, select the required language from the **First Language** drop-down list.

Completed

Checking/Correcting Connexions Assent

Applicable to Special schools only

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

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

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

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

- **Unsought:** School has not yet sent out Fair Processing Notices.
The number of pupils recorded as **Unsought**, e.g. new starters where the school has not yet had time to write to the parent/guardian, should be minimal.
- **Connexions Assent Obtained:** Permission has been given by the parent/guardian to share information about the pupil with Connexions.
- **Connexions Assent Refused:** Permission has been refused by the parent/guardian to share information about the pupil with Connexions.
- **Sought no Reply:** The school has sent out Fair Processing Notices, but has not received a reply.

For information on how to check for any missing Connexions Assent data and to complete fields in bulk, please see *Updating Information Using Bulk Update* on page 22.

Completed

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

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

- Select the **Reason for Leaving** from the drop-down list, then 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.
- Optionally, enter the **Destination** after Leaving if known, then 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.
- To remove a pupil from the list, highlight their name and then click the **Remove** button.
- 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.
- Click the **Save** button.

Completed

Re-Admitting a Pupil

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



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

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.

- Select **Focus | Pupil | Pupil Details** to display the **Find Pupil** browser.
- Click the **New** button to display the **Add Pupil** page. It is only necessary to enter limited information here as you know that the person already exists.
- Click the **Continue** button to display a list of **Matched People** based on the criteria entered on the **Add Pupil** page.

- 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?

- Click the **Yes** button if you are certain that this is the pupil who should be re-admitted. Their details are then displayed on the **Pupil Details** page.
- Complete the mandatory fields (**Date of birth**, **Gender**, **Year Group**, **Enrolment Status**, **Year Taught In** and **Admission Date**) and check any other details that may have changed since they were last on-roll, such as their address. Ensure that the UPN is recovered or a new UPN generated, if it did not previously exist.
- 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**.

Completed

Checking/Correcting Special Educational Needs (SEN) Information

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

- **N - No Special Educational Need**
- **A - School/Early Years Action**
- **P - School/Early Years Action+**
- **S - Statement.**

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

The screenshot shows the 'Find SEN Student' browser interface. It includes search fields for Surname, Forename, Tier, Year Group, Class, House, and SEN Status. The SEN Status is set to 'P - School/Early Years A'. The results table is as follows:

Name	Year Group	Class	House	Gender	SEN Status
Anderson, Jacob	5	5VC		Male	P - School/Early Years Acti...
Batra, Jill	5	5BB		Female	P - School/Early Years Acti...
Candy, Molly	5	5BB		Female	P - School/Early Years Acti...

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

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

3 Basic SEN Details

Status: S - Statement Start Date: 22/04/2008

(No statement decisions pending)

Ran...	Need Type	Description
1	Behaviour, Emotional and Social Dif...	
2	Severe Learning Difficulty	

Full Descriptions

Attachment	Summary	Type	Owner
	Behaviour, Emotional and So...	General Document	Grosvenor Gillian

Curriculum and Teaching Methods

Grouping and Support

Advice and Assessment

Specialised Resources

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

5. Optionally, complete any other information as required then click the **Save** button to save any changes.


Completed

Adding Gifted and Talented Pupils

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

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

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

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

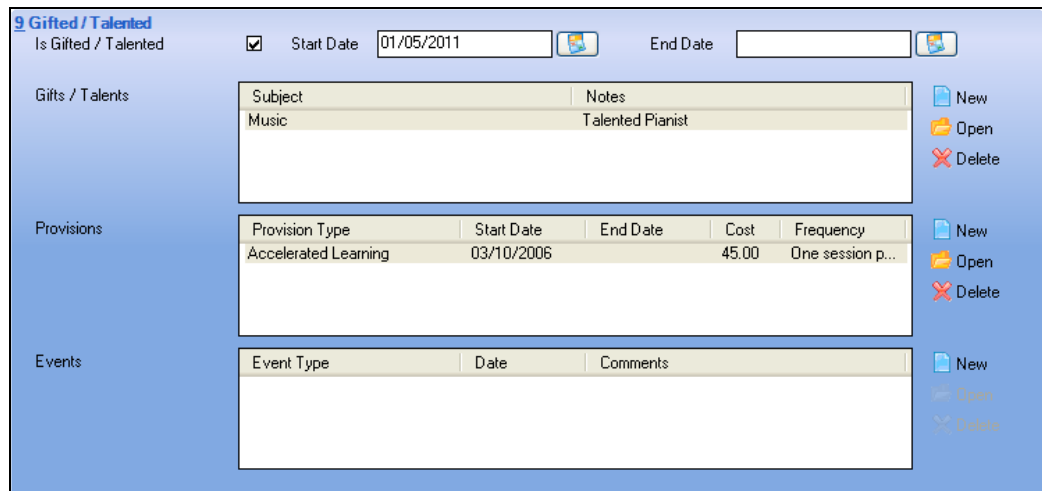
Ensure that the gifted/talented **Start Date** is entered correctly, as this is collected in the School Census return.

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



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

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



9 Gifted / Talented

Is Gifted / Talented Start Date End Date

Gifts / Talents

Subject	Notes
Music	Talented Pianist

Provisions

Provision Type	Start Date	End Date	Cost	Frequency
Accelerated Learning	03/10/2006		45.00	One session p...

Events

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

4. Select the **Is Gifted / Talented** check box to activate the **Start Date** field (defaults to today's date). A historic date can be entered, if required.
5. Although not collected for the return, additional information can be recorded as follows:
 - To add gifts and/or talents, click the **New** button adjacent to the **Gifts / Talents** table to display the **Add/Edit Gift/Talent** dialog.

Select the **Subject** in which the pupil excels, add any applicable Notes then click the **OK** button to return to the **Gifted / Talented** panel.
 - To enter **Provisions** and/or relevant **Events**, click the appropriate **New** button then enter the required information.
6. Click the **Save** button on the **Pupil SEN Details** page to save any changes.


 **Completed**

Preparing Exclusions Information

Not applicable to Nursery schools

Exclusions information is required for pupils who were subject to any exclusion with a start date during the period 01/09/2010 to 31/12/2010 inclusive.


Exclusions should not be counted if the Head Teacher withdrew them, or if the pupil was reinstated by the Discipline Committee or an independent Appeal Panel.

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

The following data items are required for the School Census:

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

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

Recording an Exclusion

1. Select **Focus | Pupil | Exclusions** to display the **Find Exclusions Pupil** 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** from the drop-down list, i.e. **AM** or **PM**.
7. Click the **Calculate** button to automatically populate the **Length School Days** field.

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

Academic Year	Term	Start Date	End Date	Length	Exclusion Type	Exclusion Reason
Academic Year 2010/2011	Autumn Term	23/11/2010	25/11/2010	3	Fixed Term	Verbal abuse/threatening behaviour a...

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

 **Completed**

Preparing Attendance Information

Applicable to Primary schools only

Termly attendance data (including attendance codes and the number of sessions missed) should be provided for all pupils aged 5 to 15 inclusive on 31/08/2010 (i.e. where their date of birth falls between 01/09/1994 and 31/08/2005 inclusive) who were on-roll for at least one session during the period from 01/01/2011 to 24/04/2011 inclusive.

The attendance data collected in the School Census return includes:

- Attendance Codes
- Number of Sessions Missed

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



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

If you do not use SIMS Attendance/Lesson Monitor, and you do not use a software package that writes back to the SIMS database, or if you have not converted to the code of practice attendance codes, you need to manually calculate and enter the following information via the **Census Details** page:

- Possible Sessions
- Sessions Missed due to Authorised Absence
- Sessions Missed due to Unauthorised Absence

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

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

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

Completed

Preparing Class Information (Checking Class Types)

Applicable to Primary schools only

Before starting the return, it is necessary to indicate which classes a pupil is a member of – either **Nursery** (if the pupil is currently in a LA designated Nursery Unit) or **Other** (any other class). This is only needed for newly added pupils where they have transferred from a LA designated Nursery Unit into an 'Other' class.

The values displayed on the **Update Class Type** page default to those of the previous return. Existing details should be checked and edited, if necessary, and the details of any new pupils added.



NOTE: A class type must be recorded against each pupil on-roll.

1. Select **Tools | Statutory Return Tools | Update Class Type** to display the **Update Class Type** page.

Name	Date of Birth	Gender	AdNo.	Year	Reg	Nursery	Other
Aaron, Chris	01/09/2006	Male	001102	N	AM	<input checked="" type="checkbox"/>	
Aaron, Liz	01/09/2006	Female	001103	N	AM	<input checked="" type="checkbox"/>	
Aaron, Sophie	01/09/2006	Female	001104	N	AM	<input checked="" type="checkbox"/>	
Abraham, Jane	19/05/2006	Female	001041	R	PINE		<input checked="" type="checkbox"/>
Ackton, Stanley	18/12/2002	Male	000842	3	3TO		<input checked="" type="checkbox"/>
Ackton, William	11/06/1999	Male	001040	5	5BB		<input checked="" type="checkbox"/>
Acton, Jordan	11/02/2005	Male	000981	1	ELM		<input checked="" type="checkbox"/>
Acton, Samantha	25/03/2004	Female	001011	2	2JB		<input checked="" type="checkbox"/>
Adams, Adam	31/08/2006	Male	001122	R	ASH		<input checked="" type="checkbox"/>
Adebayor, Emmanuel	15/02/2005	Male	001068	1	PINE		<input checked="" type="checkbox"/>
Adedeji, Payal	03/03/2002	Male	000797	4	4ES		<input checked="" type="checkbox"/>
Affleck, Alexis	20/07/2003	Female	000843	3	3CB		<input checked="" type="checkbox"/>
Agathocleous, Stelios	18/06/2002	Male	000805	4	4SL		<input checked="" type="checkbox"/>
Ahmad, Arfa	30/11/1999	Female	000654	6	6VC		<input checked="" type="checkbox"/>
Ahmad, Carina	01/09/2001	Female	000781	4	4ES		<input checked="" type="checkbox"/>
Ahmed, Mohan	05/01/2000	Male	000691	6	6KH		<input checked="" type="checkbox"/>
Aldridge, Courtney	27/06/2002	Female	000875	4	4SL		<input checked="" type="checkbox"/>
Allim, Farah	27/12/2001	Female	000804	4	4SL		<input checked="" type="checkbox"/>
Aloia, Paolo	20/07/2003	Male	000844	3	3TO		<input checked="" type="checkbox"/>
Americana, Kari	30/01/2005	Female	001069	1	PINE		<input checked="" type="checkbox"/>
Amiel, Tanzeel	02/07/2001	Female	000733	5	5BB		<input checked="" type="checkbox"/>

2. To specify the class type for an individual pupil, click in the appropriate cell of the **Nursery** or **Other** column to enter a tick. Clicking again removes the tick, if necessary.
3. If all or the majority of pupils need to be assigned the same class type, the following method can be used to quickly populate the **Nursery** and **Other** columns:
 - a. Right-click the **Other** column header and select **Check All**.
 - b. In the **View Students** panel, select **Year N2** from the **Year Group** drop-down list. Year N2 pupils only are displayed in the **Students** panel.
 - c. Right-click the **Nursery** column header and select **Check All**.
 - d. Repeat steps **b** and **c** for any additional Nursery classes.
 - e. To check your selections, select **All** from the **Year Group** drop-down list.
4. To select a class type for all the pupils listed, right-click on the applicable column heading and select **Check All** from the pop-up menu.

5. 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.

6. Click the **OK** button to return to the **Census Return Details** page, where the updated class types are displayed.

Resetting All Class Types

To reset all class types, right-click in the **Students** grid, then select **Remove All** from the drop-down list. The **Nursery** and **Other** columns are cleared of all ticks.

Re-enter correct class types as previously described.

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 **View Students** panel. Any pupils without a **Class Type** are displayed in the **Students** panel.

Completed

Checking/Correcting Hours at Setting Information

Applicable to schools that have 2, 3 or 4 year olds pupils only

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

For the School Census Summer 2011 Return, a pupil's age is determined by their age at 31/08/2010.

The Hours At Setting recorded using the following method (i.e. via **Tools | Statutory Return Tools**) are also displayed in the **Hours at Setting** panel on the **Census Details** page when the School Census Summer 2011 Return is created via **Routines | Statutory Returns | School Census**.

The method for updating hours at setting for 2, 3 and 4 year olds is the same. Existing details should be checked and edited if necessary, and the details of any new pupils added. The following example describes how to update data for 3 year olds.

1. Select **Tools | Statutory Return Tools | Update Hours at Setting for 3 year olds** to display the **Update Hours at Setting for 3 year olds** page.

The Hours at Setting data is brought forward from the School Census Spring 2011 Return and Summer is displayed by default in the Census panel.

Name	Date of Birth	Gender	AdNo.	Year	Reg	Age	Hours at Setting
Aaron,Chris	01/09/2007	Male	001102	N	AM	3	12
Aaron,Liz	01/09/2007	Female	001103	N	AM	3	12
Aaron,Sophie	01/09/2007	Female	001104	N	AM	3	12
Barnes, Lucy	13/12/2007	Female	001105	N	PM	3	12
Barnes, Tommy	13/12/2007	Male	001106	N	PM	3	12
Chappling, Martin	02/11/2007	Male	001107	N	PM	3	12
Dickinson, Sally	22/10/2007	Female	001108	N	AM	3	11
Eagle, Ruby	20/03/2008	Female	001109	N	PM	3	12
Fell, Mia	28/09/2007	Female	001110	N	AM	3	12
Glass, Ella	30/12/2007	Female	001111	N	PM	3	12
Idle, Dylan	08/03/2008	Male	001112	N	AM	3	
Jump, Forlan	15/06/2008	Male	001113	N	PM	3	12
Kall, Kieth	31/10/2007	Male	001114	N	AM	3	12
Long, Gemma	19/11/2007	Female	001115	N	PM	3	26
Macabee, George	25/12/2007	Male	001116	N	AM	3	12
Mario, Luigi	17/09/2007	Male	001117	N	PM	3	12
Newark, Paul	26/01/2008	Male	001118	N	AM	3	12
Oval, Amanda	13/03/2008	Female	001119	N	PM	3	12
Pill, Gail	11/01/2008	Male	001120	N	AM	3	12

Provided that Early Years Attendance Patterns have been defined (via **Focus | Pupil | Pupil Details**) for pupils who are receiving free nursery care, the Hours at Setting can be updated automatically.

2. Click the **Update Hours at Setting** button to display the number of hours that the listed pupils are expected to attend during the census week (based on the early years provision times recorded as part of their attendance pattern).



NOTE: If your school does not use the Define Early Years Attendance Patterns functionality, the data can be entered in the grid manually.

3. To manually add or edit the number of Hours at Setting appropriate to each pupil, select the required pupil then double-click in the cell and entering the required number.

**IMPORTANT NOTES:**

A value between 0 and 99.5 must be entered for each pupil (0 (zero) is a valid value). If the value entered is within this range but higher than expected by the DfE, a validation error is displayed when the return is created and validated. An explanation as to why the value is higher should be emailed to IMRS.

Hours must be entered in increments of 0.5 only.

*If any cell in the **Hours at Setting** column is left blank, a validation error is displayed when the return is created and validated. Enter a value between 0 and 99.5.*

4. If most of the pupils are receiving the same number of hours at setting, the following method can be used to quickly populate the **Hours at Setting** column:
 - a. In the **Pupil View** panel, select as appropriate from the **Year Group** drop-down list, e.g. AM or PM for 2 year olds, N for 3 year olds, R for 4 year olds. The selected pupils only are displayed in the **Pupils** panel.
 - b. Right-click in the **Pupils** panel, then select **Select All** from the drop-down list.
 - c. Click in one of the highlighted cells of the **Hours at Setting** column then enter the number of hours that is correct for the majority of pupils.
 - d. The number is automatically entered for all selected pupils.
 - e. Click to the right of the grid to deselect all.
 - f. Amend the entry for each pupil who is receiving a different number of hours at setting. This is achieved by selecting the required pupil, then clicking in the associated Hours at Setting cell and entering the required number.
5. Click the **Save** button.

Identifying which Pupils have no Entries for Hours at Setting

In the **Pupil View** panel, ensure that the required **Year Group** and **Reg group** is selected, then select **No Hours at Setting** from the **Status** drop-down list.

Any pupils who do not have an entry for hours at setting are displayed. Enter the values for these pupils as previously described.

Completed

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 inadvertently included in the return. This is achieved via **Routines | Pupil | Delete Pupil**. After selecting the required pupil, you have the chance to review and print their information before permanently deleting their record.



IMPORTANT NOTE: *A pupil should only be deleted if they have been entered in error. The deletion is irreversible. You must contact IMRS if you have to delete a pupil off SIMS.*

Completed

05

What Next?

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

The SIMS Spring 2011 Release must be installed before completing School Census Summer 2011 Return. However, it is advisable to check that no later version of SIMS is available, then upgrade to the current release of SIMS, if necessary.

You should now be ready to produce the final School Census Summer 2011 Return. For specific instructions, please refer to the *Summer 2011 School Census Primary, Infant and Junior School Completion notes* or the *Summer 2011 School Census Special School notes*.