

# Primary School Summary End of Year Procedures (and Promotion to the Academic Year 2010/2011)

Version 1.1

**WARNING:** You must complete these procedures before the start of the new academic year.

It is critical that the new academic year is created and promotion routines run before the old year ends. These processes determine the year groups and registration groups into which pupils are placed in the new academic year. We therefore suggest you start these processes as early as possible, allowing sufficient time to complete by the start of the new academic year.

Capita Children's Services has made this document available in both Microsoft® Word (available from SupportNet) and PDF format to enable Local Authorities to edit the information supplied herein. Capita Children's Services cannot be held responsible for any changes, errors or omissions resulting from the subsequent editing of this supplied document.

# Contents

Revision History .....	1
Introduction .....	1
Permissions Required.....	1
Where to Find More Information.....	1
End of Year Procedure Check List .....	2
Recording Changes to Teaching Staff.....	3
Adding New Teachers .....	3
Adding Leaving Dates for Existing Staff Members .....	3
Creating the New Academic Year .....	3
Setting up the New Academic Year's Pastoral Structure .....	4
Adding Intake/Admission Groups .....	5
Importing Admissions and Transfer Files (ATF).....	5
Importing Common Transfer Files (CTF).....	5
Checking Dates for Part-Time Pupils .....	6
Recording Leavers.....	6
Exporting Common Transfer Files (CTF) .....	6
Setting up the Promotion Mapping for the New Academic Year .....	7
Checking the Registration Tutors Assigned .....	8
Changing the Status of Applications to Offered or Accepted .....	8
Allocating Applicants to Registration Groups/Classes .....	9
Printing Class (Registration Group) Lists for the New Academic Year .....	10
Registration Groups (Dated) Report.....	10
Registration Group (Dated – DOB Sort).....	10
Registration Group (Dated – Gender Sort).....	10
Registration Group (Dated – With Columns).....	10
In SIMS Attendance - Printing OMR Registration Sheets for the First Week of Term .....	11
In SIMS Attendance - Entering Reasons for Absence Last Year .....	12
Other SIMS Module Processes .....	12
Academic Management (Primary Curriculum) End of Year Processes .....	12
Dinner Money 1.40 .....	13
SIMS Learning Gateway.....	13
After the New Academic Year has Started.....	13
Admitting Applicants .....	14
Re-Admitting Pupils .....	14
In SIMS Attendance - Printing the Official Register for July .....	14
In SIMS Attendance - Using the Part-Time Pupils Routine to Add Not Required Codes.....	15
SIMS Learning Gateway.....	17
Running Housekeeping Routines in SIMS .....	17
Importing the Key Stage 1 Wizard (Junior Schools Only) .....	17

## Revision History

Doc. Version	Change Description	Date
1.1	Initial Release	26/05/10

## Introduction

This document describes the steps that should be followed to enable a successful transition from one academic year to another. It includes the creation of a new academic year, setting up next year's registration groups and year groups, etc. together with the promotion of pupils from one year into the next.

It is applicable to Primary school SIMS users. Secondary school users should refer to the *Secondary School End of Year Procedures* available from SupportNet (<http://support.capitaes.co.uk>) – enter **EOY** in the **Site Search** field.

---

**WARNING: You must complete these procedures before the start of the new academic year. It is critical that the new academic year is created and promotion routines run before the old year ends. These processes determine the year groups and registration groups into which pupils are placed in the new academic year. We therefore suggest you start these processes as early as possible, allowing sufficient time to complete by the start of the new academic year.**

---

## Permissions Required

The permissions required to carry out the various end of year processes vary. However, users who are members of the School Administrator and Admissions Officer user groups in System Manager can carry out all the functions in this document. Please consult your System Administrator if you are unsure whether you have the required permissions.

## Where to Find More Information

Release notes for previous releases can be obtained by clicking the appropriate menu link on the Home page of our SOLUS website (<http://www.capitaes.co.uk/solus>).

All handbooks referred to throughout this release note can be obtained from any of the following locations:

- The **Documentation** button on the **Home Page** in SIMS. Once open, click the **Handbooks** button, select the required category then click the required handbook on the **Handbooks** page.
- SupportNet – copies of all handbooks are posted to SupportNet (<http://support.capitaes.co.uk>) and can be obtained by clicking the **Documentation** button on the **Home Page**, then selecting **SIMS Handbooks** from the **Category** drop-down list and clicking the **Search** button.

If you are unable to obtain the required handbook using any of these methods, please email [publications@capita.co.uk](mailto:publications@capita.co.uk) and we will be pleased to email a copy to you.

## End of Year Procedure Check List

This section provides a check list of all the actions that form part of the end of year process.

✓	Description/Task
<input type="checkbox"/>	Recording changes to teaching staff on page 3.
<input type="checkbox"/>	Creating the new academic year on page 3.
<input type="checkbox"/>	Setting up the new academic year's pastoral structure on page 4.
<input type="checkbox"/>	Adding intake/admission groups on page 5.
<input type="checkbox"/>	Importing Admissions and Transfer Files (ATF) on page 5 if applicable.
<input type="checkbox"/>	Importing Common Transfer Files (CTF) on page 5.
<input type="checkbox"/>	Checking Dates for Part-Time Pupils on page 6.
<input type="checkbox"/>	Recording leavers on page 6.
<input type="checkbox"/>	Exporting Common Transfer Files (CTF) on page 6.
<input type="checkbox"/>	Setting up the promotion mapping for the new academic year on page 7.
<input type="checkbox"/>	Changing the Status of Applications to Offered or Accepted on page 8.
<input type="checkbox"/>	Allocating applicants to Registration Groups/Classes on page 9.
<input type="checkbox"/>	Printing class (registration group) lists for the new academic year on page 10.
<input type="checkbox"/>	In SIMS Attendance - print OMR registration sheets for the first week of term on page 11.
<input type="checkbox"/>	In SIMS Attendance - enter reasons for absence last year (if required) on page 12.
<input type="checkbox"/>	Other SIMS Module Processes on page 12.

### Routines for after the new academic year has started

<input type="checkbox"/>	Admitting applicants on page 14.
<input type="checkbox"/>	Re-admitting pupils on page 14.
<input type="checkbox"/>	In SIMS Attendance - Print the Official Register for July on page 14.
<input type="checkbox"/>	In SIMS Attendance - Use the Part-Time Pupils Routine to Add Not Required Codes on page 15.
<input type="checkbox"/>	Running housekeeping routines in SIMS on page 17.

## Recording Changes to Teaching Staff

The details of new teachers joining the school should be recorded as soon as the information is available (non-teacher information can be added when known, but is not required for the end of year process). Any existing teachers who are leaving the school should be allocated a leaving date.

### Adding New Teachers

1. Select **Focus | Person | Staff** then click the **New** button to display the **Add Employee** page.
2. Enter the required information ensuring the **Teaching Staff** check box is selected and the applicable **Teacher Category** is chosen from the drop-down list, such as **Qualified Teachers**.
3. Click the **Save** button to add the member of staff. Repeat for any other members of staff joining the school.

**Completed**

### Adding Leaving Dates for Existing Staff Members

1. Select **Focus | Person | Staff** and choose the required member of staff.
2. Enter the **Date of Leaving** in dd/mm/yyyy format in the **Employment Details** panel.
3. Click the **Save** button to save the changes. Repeat for any other leavers.

**Completed**

## Creating the New Academic Year

This process defines the start and end dates for each of the school terms and half-term holidays, together with dates for public holidays and staff training days. If SIMS Attendance is in use, appropriate attendance records are created for each pupil on the dates entered.

---

### **IMPORTANT NOTES:**

*Due to the amount of processing resource required to create an academic year, whilst not essential, it is strongly recommended that all other users log out of SIMS before commencing this process. Continuing to work whilst an academic year is being created is likely to result in error messages.*

*Please be aware that the process may take a long time because the system creates attendance records for the new academic year.*

*When creating an academic year, the start date of the first term is deemed to be the first day of the academic year. This may not necessarily be the day that pupils arrive in school; it could be an INSET day, for example. An end date is calculated for 365 days later.*

*For example, if the academic year starts on 02/09/10 then an end date of 01/09/11 is automatically supplied.*

*The first day of term should be specified even if pupils are not in attendance.*

*Any dates within the start and end dates of the academic year that are not term dates or training days, are considered to be holidays. This prevents the need to manually enter holidays (apart from half-terms and bank holidays).*

*Promotion into new year groups, etc. occurs automatically on the first day of the first term of the new academic year (providing that the promotion process has been carried out).*

---

Before proceeding, please check that you have carried out the following:

- Recorded any changes to teaching staff (adding any new teachers and dates of leaving for any leavers).
  - Ensured that you have the new academic year term dates, training days, etc. to hand.
1. Select **Routines | School | Academic Year** to display the **Create Academic Year** wizard.

2. Follow the instructions provided in the wizard, clicking the **Next** button as you complete each page.

You will need to:

- define the school working week (which in most cases will be Monday to Friday).
- define the school terms by entering the term dates.
- define the half term holidays.
- define teacher training days (this can be done at a later date via the School Diary, if preferred).
- define public holidays such as Bank Holidays.

**Completed**

## Setting up the New Academic Year's Pastoral Structure

The new academic year's pastoral structure is automatically set up when the new academic year is created and is based on the current academic year's structure. Therefore, you must ensure that a new academic year has been created before proceeding with the instructions in this section.

There may be occasions when the new academic year's pastoral structure needs to be different from the current structure. For example, you may wish to:

- add additional classes, where pupil numbers have increased.
- merge registration groups, where pupil numbers have decreased.
- add a new year group, where a Nursery has been introduced in your school.
- change class names.

---

### NOTES:

*It is not essential to assign teachers to classes at this stage. This can be done when the information is known, but must be done before the start of the academic year so that Attendance records are not affected.*

*If you want teachers to be promoted with their pupils in the next academic year, this can be achieved as part of the pastoral promotion process. For more information, please see Setting up the Promotion Mapping for the New Academic Year on page 7.*

*If an additional year group is required, e.g. a Nursery has been introduced to the school, this should be added before admission groups are created to ensure that the new year group is available for selection. For more information, please see Adding Intake/Admission Groups on page 5.*

---

The next year's structure can be edited via **Focus | School | Pastoral Structure | Next Academic Year Structure** to display the **Next Academic Year Pastoral Structure** page.

---

**IMPORTANT NOTE:** To ensure that changes are being made for the next academic year, rather than the current academic year, ensure that the start date of the next academic year is displayed in the **Effective Date** field.

---



- Add any new year groups by right-clicking on **Pastoral Structure** and selecting **New Year Group**. Complete the details in the **Year Group** dialog, then click the **OK** button.
- Add any registration groups by right-clicking on the **Registration Group** folder and selecting **New Registration Group**. Complete the details in the **Registration Group** dialog.

---

*NOTE: It is strongly recommended that you check to see if the name you intend to use for a new registration group has not been previously used. This is achieved by right-clicking the required **Registration Group** folder in the pastoral structure and selecting **Reuse Old Registration Group**. A dialog is displayed listing any registration groups that have been previously deleted.*

*If the required name is listed, highlight the name and click the **OK** button to re-use the registration group rather than creating a new registration group with the same name. If the required name is not listed, create a new registration group.*

---

**Completed**

## Adding Intake/Admission Groups

Intake and admission groups are used to maintain lists of the applicants who have registered an interest in being taught at your school. It is now possible to create an intake group containing one or more admission groups. For example, an intake group consisting of separate admission groups for those joining in Autumn, Spring and Summer terms might be set up for your Nursery.

---

**IMPORTANT NOTES:** *Please ensure that the **Date of Admission** lies within the new academic year. We recommend that the date of admission is the day on which the applicants will actually arrive in school, i.e. not a teacher training day. However, please check with your Local Authority for advice on the correct date to use if you are unsure.*

*If you have previously created admission groups with an incorrect **Date of Admission**, amending the date also amends the **Date of Admission** for every applicant who is a member of the group, preventing the need to edit them individually.*

---

If you need to add a new year group but have already created intake/admission groups, you will need to create new intake/admission groups after the additional year group has been added and then move any existing members to the new intake/admission group(s).

This is also a good time to delete or make inactive any unwanted admission groups. Detailed instructions on adding and maintaining admission groups can be found in the appropriate SIMS Admissions Code of Practice handbook.

Add the intake/admission groups via **Routines | Admission | Admission Groups | Setup** to display the **Find Intake Group** browser.

**Completed**

## Importing Admissions and Transfer Files (ATF)

If your Local Authority has provided you with an ATF file, this should have been imported around March time, as described in the appropriate SIMS Admissions Code of Practice handbook. Any additional children can be imported via CTF, as described in the following section.

## Importing Common Transfer Files (CTF)

Import any CTFs that have not yet been imported via **Routines | Data In | CTF | Import CTF** to display the **Import CTF** page.

For more information on Importing a CTF, please refer to the *Importing and Exporting CTFs* chapter in the *Managing Pupil/Students in SIMS* handbook.

For information on changing the status of the application from **Applied** to **Offered**, please refer to the appropriate SIMS Admissions Code of Practice handbook.

**Completed**

## Checking Dates for Part-Time Pupils

To ensure that pupils who are no longer part-time are showing correctly in Attendance, it is necessary to enter an end date in their part-time details in SIMS and to change their attendance mode to all day. This is mostly relevant to Nursery schools (or schools with nursery age children). However, any pupil can be marked as part-time if their attendance is anything less than 10 sessions per week. Check details via **Focus | Pupil | Pupil Details**, select the **Registration** panel then check or amend the **End Date** in the **Part Time Details** section.

Once you have determined which pupils are part-time (i.e. which pupils are AM only or PM only), you need to define the part-time sessions and dates for the AM/PM groups for all or part of the coming year. Running this routine will also ensure that pupils who are no longer part-time will have their attendance records amended accordingly. Please see *In SIMS Attendance - Use the Part-Time Pupils Routine to Add Not Required Codes* on page 15 for more information.

**Completed**

## Recording Leavers

The facility to record leavers enables accurate records to be kept of pupils after they have left the school. During the Summer term you will need to mark most, or all of the pupils as leaving on the same day. You should only mark pupils as leavers if you are sure they are leaving, e.g. Year 6 pupils moving on to Secondary school.

---

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

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

*To ensure that information required for statutory returns, such as the School Census, is accurate and up-to-date, it is recommended that you check that all leavers have at least the minimum statutory information recorded before making them a leaver, e.g. Ethnicity.*

---

This is achieved via **Routines | Pupil | Leavers**.

**Completed**

## Exporting Common Transfer Files (CTF)

Common Transfer Files can be created and sent to other schools or Local Authorities via **Routines | Data Out | CTF | Export CTF**

---

**NOTE:** *Before proceeding, you must have previously added any required **Feeder** and **Destination Schools** via **Tools | Other Schools** and specified the directory into which the CTF export will be saved via **Tools | Setups | CTF**.*

*Please ensure that the relevant pupils are given a **Date of Leaving** before exporting the CTF.*

---

For more information on Exporting a CTF, please refer to the *Importing and Exporting CTFs* chapter in the *Managing Pupil/Students in SIMS* handbook.

**Completed**

## Setting up the Promotion Mapping for the New Academic Year

Setting up the promotion paths for the pastoral structure plays a key part in the end of year procedures and ensures that pupils move from their current year group and class into the correct year group in the new academic year. This process is used to set the path for year groups and classes, but it is also possible to specify a promotion path for individual pupils in case there are any exceptions. For more information, please see *Viewing/Setting the Promotion Path for Individual Pupils* on page 8.

Setting the promotion mapping can be carried out at any point, as the promotion itself occurs at the beginning of the next academic year. However, it must be done before the start of the academic year.

You can repeat the process a number of times until you are happy that all pupils have been allocated to the appropriate classes.

**BEFORE PROCEEDING:** Please check that you have carried out the following:

- Recorded any changes to teaching staff (added new teachers and added dates of leaving for any leavers).
- Created the new academic year.
- Amended your pastoral structure as required, such as adding new classes.

1. Select **Routines | School | Promotion** to display the **Promotion Data Check** dialog. Click the **Ok** button on the **Setup Promotion Mapping** dialog.
2. Click the **Load** button on the **Setup Promotion** dialog.

The screenshot shows the 'Setup Promotion Mapping' dialog box. At the top, the title bar reads 'Setup Promotion Mapping'. Below it, the 'Academic Year' section has a dropdown menu currently showing 'Academic Year 2009/2010' and a 'Load' button to its right. The 'Year Group' section contains a table with two columns: 'Year Group' and 'Promotion Path'. Below this table is an 'Override membership' checkbox (unchecked) and a 'Set Default' button. The 'Registration Group' section contains a table with six columns: 'Year', 'Registration Group', 'Promotion Path', 'Supervisor', 'Promote Registration Tutor', and 'Promote Other Supervisors'. Below this table is another 'Override membership' checkbox (unchecked) and a 'Finish' button.

**WARNING:** It is imperative that you select the correct academic year otherwise any changes made will affect the wrong year and it will be very difficult to rectify.

3. Change the promotion path if required, by clicking the required year group in the **Promotion Path** column then selecting the required year from the drop-down list.

**NOTE:** Schools that have a year group **N1** must ensure that this is mapped to **N2**.

Year	Registration Group	Promotion Path	Registration Tutor	Promote Registration Tutor	Promote Other Supervisors
Year N2	PM		Ms Lisa Lawson	<input type="checkbox"/>	<input type="checkbox"/>
Year N2	AM		Mrs Rebecca Lorrin	<input type="checkbox"/>	<input type="checkbox"/>
Year R/Yea..	ELM	2JB	Mr Richard Perrin	<input type="checkbox"/>	<input type="checkbox"/>
Year R/Yea..	PINE	2GH	Mr Oliver Joyner	<input type="checkbox"/>	<input type="checkbox"/>
▶ Year R/Yea..	ASH	2JB	Miss Amelia Kent	<input type="checkbox"/>	<input type="checkbox"/>
Year R/Yea..	OAK	2GH	Miss Shirley Fortune	<input type="checkbox"/>	<input type="checkbox"/>
Year 2	2JB	3TD	Mrs Jennifer Arlene Bosw...	<input type="checkbox"/>	<input type="checkbox"/>

- Review the promotion path for each class. The **Class** panel displays a list of the classes for the current academic year. Move down one class at a time by clicking in the **Registration Group** column then select the class to which the pupil will be promoted from the **Promotion Path** column drop-down list. Repeat this process for all the classes in the **Class** panel.
- If you want the tutor of the class to be promoted into the next academic year with the class, select the **Promote Registration Tutor** check box.
- If any existing Classroom Assistants or Learning Support Assistants should be promoted into the next academic year with the class, select the **Promote Other Supervisors** check box.
- Select the **Override Membership** check box in both the **Year Group** and **Class** panels the first time you carry out the promotion mapping process. Click the **Finish** button to save the settings.

**IMPORTANT NOTE:** If you already carried out this process to set up your mappings and you now wish to edit them, please ensure that the **Override Membership** check box is not selected if you wish to retain your previous settings.

- Click the **Save** button to save the promotion mappings. The promotion occurs at the beginning of the next academic year. A warning dialog is displayed if any unusual promotions have been selected. Accept the warning by clicking the **Yes** button.

**Completed**

## Checking the Registration Tutors Assigned

Once the promotion mapping process is complete, you are strongly advised to check the registration group assignments in the pastoral structure via **Focus | School | Pastoral Structure | Next Academic Year Structure**.

Expand the structure and check each registration group by right-clicking and selecting **Properties**. If necessary, add/amend the registration tutor. If you have two registration tutors sharing the group, add the other registration tutor as a Supervisor, ensuring that you select the **Role** of **Joint Main Supervisor**.

**Completed**

## Changing the Status of Applications to Offered or Accepted

When adding applicants to SIMS (manually or imported via ATF or CTF), an application is automatically given a status of **Applied**. If required, you can then offer places to applicants you wish to join your school (**Offered**) and then change the status of the application to **Accepted** once you have received confirmation that they will be joining. It is possible however, to change an application status from **Applied** to **Accepted** or even straight to **Admitted**, if required.

It is also possible to change the application status of individual applicants. For more information, please refer to the appropriate SIMS Admissions Code of Practice handbook.

This section assumes that you have added all of the required applicants via **Focus | Admission | Application**, and that you have imported via CTF or ATF.

## Allocating Applicants to Registration Groups/Classes

Before allocating applicants to classes, you must have:

- added the applicants via **Focus | Admission | Application**, or imported via ATF or CTF.
  - given each applicant an application status of **Offered** or **Accepted**. For more information, please see *Change the Status of Applications to Offered or Accepted* on page 8.
1. Select **Focus | School | Pastoral Structure | Next Academic Year Structure** to display the **Next Academic Year Pastoral Structure** page.
  2. Right-click the applicable **Registration Group** folder and select **Members** from the pop-up menu to display the **Allocate Students/Applicants** dialog.

**Effective Date Range**

From effective date to end of the academic year ( )  Over the whole academic year ( 01/09/2009 - 31/08/2010 )

**Student Status**

Students  Accepted Applications  Current Applications (Applied / Offered / Reserved)

**Members** Print Actions

Name	Gender	Year Group	Reg Group	PM	AM
Aaron, Chris	Male	Year N2	AM		<input checked="" type="checkbox"/>
Aaron, Liz	Female	Year N2	AM		<input checked="" type="checkbox"/>
Aaron, Sophie	Female	Year N2	AM		<input checked="" type="checkbox"/>
Barnes, Lucy	Female	Year N2	PM	<input checked="" type="checkbox"/>	
Barnes, Tommy	Male	Year N2	PM	<input checked="" type="checkbox"/>	
Chappling, Martin	Male	Year N2	PM	<input checked="" type="checkbox"/>	
Dickinson, Sally	Female	Year N2	AM		<input checked="" type="checkbox"/>
Eagle, Ruby	Female	Year N2	PM	<input checked="" type="checkbox"/>	
Fell, Mia	Female	Year N2	AM		<input checked="" type="checkbox"/>
Glass, Ella	Female	Year N2	PM	<input checked="" type="checkbox"/>	
Idle, Dylan	Male	Year N2	AM		<input checked="" type="checkbox"/>
<b>Total</b>				10	10

OK Cancel

3. Select the required class for each applicant in the grid by clicking the appropriate cell to display a tick. Clicking the cell again removes the tick.
4. Once you have selected classes for each the applicants, click the **OK** button to save the changes.

**Completed**

## Printing Class (Registration Group) Lists for the New Academic Year

Class (Registration Group) lists can be easily produced using any of the following pre-defined reports:

- Registration Groups (Dated)
- Registration Groups (Dated – DOB Sort)
- Registration Groups (Dated – Gender Sort)
- Registration Groups (Dated with Columns).

If these reports do not exist on your system, you need to import the latest pre-defined reports. For more information, please refer to the *Reporting in SIMS* handbook.

Use the **Effective Date** to enter a date in the new academic year, e.g. **01/09/2010** to produce lists for the new academic year.

### Registration Groups (Dated) Report

<b>Registration Groups (Dated)</b>		
<i>Year group is Year 2 and Reg group is 2GH or 2JB</i>		
<b>Registration Group: 2GH</b>		
<b>Tutor:</b>	Mrs G Grosvenor	
<b>Room:</b>	n/a	
<b>Effective date:</b>	01/09/2010	
<b>Name</b>	<b>Gender</b>	<b>Date of Birth</b>
Amos Rosanna	F	25-05-2003
Amos Silv	F	25-05-2003
Amos Stephanie	F	25-05-2003
Andrews Paul	M	12-04-2003
Atkinson Ben	M	23-03-2003
Atkinson Bernard	M	21-03-2003
Baker James	M	05-09-2002
Brown Jeremy	M	18-12-2002
Buckley Emma	F	19-03-2003
Cardy Carly	F	11-11-2002
Carlin Tayla	F	27-03-2003
Crosby Kerry	F	06-10-2002
Daniels Sally	F	02-09-2002
Total: Males	13	
Total: Females	18	
Group Total:	<b>31</b>	

### Registration Group (Dated – DOB Sort)

As per the Registration Groups (Dated) report, but in Date of Birth order.

### Registration Group (Dated – Gender Sort)

As per the Registration Groups (Dated DOB Sort) report but in Gender order.

### Registration Group (Dated – With Columns)

As per the Registration Group (Dated) report but with five additional blank columns.

**Registration Groups (Dated with Columns)**  
*Year group is Year 2 and Reg group is 2GH or 2JB*

**Registration Group: 2 GH**  
**Tutor:** Mrs G Grosvenor  
**Room:** n/a  
**Effective date:** 01/09/2010

Name	Gender	Date of Birth	1	2	3	4	5
Amos Rosanna	F	25-05-2003					
Amos Silv	F	25-05-2003					
Amos Stephanie	F	25-05-2003					
Andrews Paul	M	12-04-2003					
Atkinson Ben	M	23-03-2003					
Atkinson Bernard	M	21-03-2003					
Baker James	M	05-09-2002					
Brown Jeremy	M	18-12-2002					
Buckley Emma	F	19-03-2003					

Total Males	13
Total Females	18
Group Total:	<b>31</b>

Completed

## In SIMS Attendance - Printing OMR Registration Sheets for the First Week of Term

1. Select **Routines | Attendance | OMR Entry | Print OMR Registration Sheet** to display the **Print OMR Registration Sheet** page.



2. Highlight the required group(s) using **Ctrl** or **Shift** to highlight multiple groups. Click the **Print** button to produce the required registration sheets.

Completed

## In SIMS Attendance - Entering Reasons for Absence Last Year

If you are using OMR Absence sheets, read the sheets in via **Routines | Attendance | OMR Entry | Read OMR Absence Sheets**.

If you are using Edit Marks (via **Focus | Attendance | Edit Marks**), put the date back in the **Week Beginning** field to the required date, then click the **Search** button.

Double-click the required class to display marks for the chosen group(s) then edit as required.

Edit Session Marks - W/b 08/03/2010 - ELM												
Save   Undo   Print   Codes   Preserve   Minutes Late   Comments   Vertical   Links   Help   Unpin   Close												
Previous Week   Next Week   Select All   <input type="checkbox"/> Show only students with Unexplained Absences today												
Attendance   Dinner Register												
Name	Reg	Mon 08/03		Tue 09/03		Wed 10/03		Thu 11/03		Fri 12/03		
		AM	PM	AM	PM	AM	PM	AM	PM	AM	PM	
Acton, Jordan	ELM	/	\	I	I	I	I	/	\	/	\	
Andrews, Jasmine	ELM	I	I	/	\	/	\	/	\	/	\	
Ariano, Pietro	ELM	/	\	/	\	/	\	/	\	/	\	
Ballinger, Eden	ELM	/	\	/	\	/	\	/	\	I	I	
Connor, Joy	ELM	/	\	/	\	/	\	/	\	/	\	
Franklin, Christopher	ELM	/	\	/	\	/	\	/	\	/	\	
Freewater, John	ELM	/	\	/	\	/	\	I	I	I	I	
Hawkins, Chris	ELM	/	\	/	\	/	\	/	\	/	\	
Jackson, Madison	ELM	/	\	/	\	/	\	/	\	/	\	
Jamieson, Cherrie	ELM	/	\	/	\	/	\	/	\	/	\	
Kelsey, Megan	ELM	/	\	/	\	/	\	/	\	/	\	
Kemp, Ross	ELM	/	\	/	\	/	\	/	\	/	\	
Langford, Daniel	ELM	/	\	/	\	/	\	/	\	/	\	
Lasnier, Jake	ELM	/	\	/	\	C	\	/	\	/	\	
Lawrence, Tommy	ELM	/	\	/	\	/	\	/	\	/	\	
Lewis, Nicolas	ELM	I	I	/	\	/	\	/	\	/	\	
Malik, Yanik	ELM	/	\	/	\	/	\	/	\	/	\	
North, Colin	ELM	/	\	/	\	/	\	/	\	I	I	
Patel, Nakita	ELM	/	\	/	\	/	\	/	\	/	\	
Rovoski, Vlad	ELM	/	\	/	\	/	\	/	\	/	\	
Shearwood, Adam	ELM	/	\	/	\	/	\	/	\	/	\	
Smith, Alex	ELM	/	\	/	\	/	\	/	\	L	\	
Smith, Laura	ELM	/	\	/	\	/	\	/	\	/	\	
Timothy, Christian	ELM	/	\	/	\	/	\	/	\	/	\	

Edit marks as requested.

Completed

## Other SIMS Module Processes

### Academic Management (Primary Curriculum) End of Year Processes

The Primary Curriculum module is a tool that allows schools in the Primary sector to create teaching groups by combining and re-allocating pupils from different classes or years, or by dividing up the pupils of a single class. If you have created teaching groups for the current academic year using Primary Curriculum and wish to use a similar system next year, you need to recreate these groups for the new academic year. Unlike the Pastoral Structure, academic structures are bound to specific Academic Years. So even if next year's Literacy sets look exactly like the ones in use this year, they must in fact be a different set of teaching groups, and defined within a new 'scheme'. This can be done at any point either before or after the new academic year begins, but after the promotion path has been created. The groups created within previous academic years can still be accessed by changing the academic year selected via **Tools | Academic Management | Set Academic Year**.

1. In order to create or edit teaching groups for an academic year other than the current one, select the required academic year via **Tools | Academic Management | Set Academic Year**.
2. Create new curriculum schemes and within them, the required teaching groups via **Focus | School | Academic Structure | Edit Curriculum Structure**.
3. Allocate pupils to their teaching groups via **Focus | School | Academic Structure | Curriculum Assignment by Scheme**. This needs to be done after pupils have been allocated to their new registration groups, using the promotion path.

The process of creating teaching groups is described in detail in the *Academic Management for Primary Schools in SIMS* handbook. A Quick Start Guide is also provided as an appendix in the same handbook.

## Dinner Money 1.40

---

**IMPORTANT NOTE:** Support for Dinner Money 1.40 ends in August 2010, therefore you must migrate to Dinner Money 7 before this time. Please refer to the Dinner Money Migration Process Guide for more information. This guide is available from the SIMS Dinner Money Licence CD or from SupportNet (Resource Number 15573).

---

### Migrating from Diner Money 1.40 to Dinner Money 7

You should import opening balances before closing down the year in Dinner Money 1.40. The import of opening balances into Dinner Money 7 should be carried out at the point at which you are ready to stop using Dinner Money 1.40 and starting to use Dinner Money 7. After these processes are completed, Dinner Money 1.40 should be closed to avoid new transactions from being mistakenly entered in the wrong system.

### Dinner Money 7 End of Year Processes

Unlike in Dinner Money 1.40, there is no end of year process in Dinner Money 7. However, it is advisable to reconcile pupil and staff balances, issue refunds or collect debts (where possible) by the end of term, particularly for any pupils or staff who are leaving the school.

You may choose to print off a copy of the Pupil Balances and Staff Balances report (**Reports | Dinner Money | Finance | Pupil (or Staff) Balances**) from the date of your opening balances in Dinner Money 7 to the last working day of the current academic year as a record of opening balances, all meals taken, transactions and balances at the year end.

## SIMS Learning Gateway

**This section applies only to SIMS Learning Gateway users.**

1. Create and distribute SIMS Learning Gateway accounts for new staff, pupils and parents.
2. Remove access to SIMS Learning Gateway from leavers, the parents of leavers (where they have no other children at the school), and staff who have left.

For full instructions, please refer to the *Removing Provisioned Users* chapter in the *SIMS Active Directory Provisioning Service* handbook.

## After the New Academic Year has Started

The following routines should be undertaken once the new academic year has been started.

- In SIMS, admit applicants – see page 14.
- In SIMS, record any re-admission pupil – see page 14.
- In Attendance, print the official register for July – see page 14.
- In Attendance, use the Part Time Pupils routine to add Not Required codes – see page 15.

## Admitting Applicants

Applicants should be admitted on the first day that you expect them to attend at your school and not, when they actually arrive at the school. If however, you have been contacted by a parent who explains why their child will not be able to start on the specified date, you can agree a new start date for that applicant.

---

*NOTE: Guest pupils will be admitted and a pupil record created. They will not have an admission number (because they are a guest) and therefore, will not appear on-roll. They can be selected from the **Find Pupil** browser (via **Focus | Pupil | Pupil Details**) by selecting **Guest** from the **Status** drop-down list.*

---

For more detailed instructions, please refer to the appropriate SIMS Admissions Code of Practice handbook.

To admit applicants, select **Routines | Admission | Admit Applications** to display the **Find Intake Group** browser.

**Completed**

## Re-Admitting Pupils

Any pupils who have left your school and then subsequently return, must be re-admitted rather than added to the system again. This ensures that the pupil's educational **History** is maintained.

---

### **IMPORTANT NOTES:**

*It is essential that you follow this process for re-admissions (i.e. for pupils who have left your school and subsequently return). Do not remove the **Date of Leaving** as a method of re-admitting. However, if the pupil was originally leaving and changes their mind, i.e. they do not actually leave, then you should remove their **Date of Leaving**.*

*It is perfectly acceptable for there to be a gap between the date of leaving and the date of return and this will be reflected in SIMS if it is the case (for example, if the pupil leaves in July but returns in September). If you do not want any gaps in the associated class memberships, then you will need to edit the history via **Focus | Pupil | Pupil Details** page by clicking the **History** button on the **Registration** panel.*

---

1. Select **Focus | Pupil | Pupil Details** to display the **Pupil Details** page.
2. Click the **New** button to display the **Add Pupil** page.
3. Enter the pupil's known details into the **Basic Details** panel then click the **Continue** button. A list of **Matched People** matching the search criteria entered is displayed.
4. Highlight the required pupil and click on the **Open** button to display a warning message *The selected pupil is a Leaver, do you want to re-admit the Pupil?*
5. If you are certain that this is the pupil who should be re-admitted, click the **Yes** button to display the pupil's details.
6. Add/edit further details as required, then click the **Save** button. All mandatory fields are highlighted in red and must be completed before you are able to finally save the pupil's details.
7. Click the **Save** button again if any additional data has been added.

**Completed**

## In SIMS Attendance - Printing the Official Register for July

Before printing the official register for July, you should deal with missing marks and add reasons for absence for the month you are going to print.

1. Select **Reports | Attendance | Whole Group Pupil Reports | Official Register Report** to display the **Official Register Report** page.

**Official Register Report**

Search Print Help Close

From: 01/09/2009 to 23/03/2010

Title: Official Register

Group Type: Reg Group

Show Totals  
 Show Key to Codes  
 Show History of Changes

Short Name	Description
PM	PM
AM	AM
ELM	ELM
PINE	PINE
ASH	ASH
OAK	OAK
2JB	2JB
2GH	2GH
3TO	3TO
3CB	3CB
4ES	4ES
4SL	4SL
5BB	5BB
5DT	5DT
6VC	6VC
6KH	6KH

Select All Deselect All

- Highlight the required group(s), using **Ctrl** or **Shift** to highlight multiple groups. Click the **Print** button to produce the required reports.

**Completed**

### In SIMS Attendance - Using the Part-Time Pupils Routine to Add Not Required Codes

The sessions when part-time pupils, i.e. pupils of non-statutory school age, are not required to attend school can be specified using this routine. SIMS then applies the **No Attendance Required** code (!) to the sessions that occur during the specified date range. The **Week Range** dates must lie within the new academic year and we would advise that you use the working academic year dates as explained in the following example.

*NOTE: The code **X** is recorded as **Non Compulsory School Age Absence**.*

The part-time pupil functionality is available via a dedicated menu route (**Tools | Setups | Attendance Setup | Part Time Pupils**). To ensure that the dedicated menu route is available, select the **Show Part-time Pupils** check box in the **Visibility Switches** panel.

- Select **Tools | Setups | Attendance Setup | Part Time Pupils** to display the **Part Time Pupils** page.

2. Specify the date range appropriate to the period for which your chosen group will be part-time. The dates must lie within the academic year.
3. Highlight the required groups (using **Ctrl** or **Shift** to highlight multiple groups). The **Select All** and **Deselect All** button can also be used if required.
4. Specify when attendance is required by selecting one of the radio buttons.

- **Attendance required in mornings only**
- **Attendance required in afternoons only**
- **Attendance required all day**

Select this option when a part-time pupil starts full-time school. All 'Not Required' codes for the pupil are removed from the system.

- **Apply a weekly pattern of Not Required codes**

Select this option if a mixture of AM and PM sessions is required. The associated grid is then enabled. Select the check boxes that represent the sessions when the pupils are not required to attend school.

In the following example, the pupils are expected to attend Monday, Tuesday, Thursday and Friday morning, and all day on Wednesday.

	Mon AM	Mon PM	Tue AM	Tue PM	Wed AM	Wed PM	Thu AM	Thu PM	Fri AM	Fri PM
I	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

5. Existing marks can be protected or overwritten. This is achieved by clicking the **Preserve/Overwrite** toggle button.



Preserve/Overwrite toggle button

*NOTE: If **Overwrite** is selected, SIMS saves the specified pattern of marks (overwriting any existing marks), for all sessions in the selected range of weeks.*

6. Click the **Apply** button to apply the codes to the selected part-time pupils.

## SIMS Learning Gateway

**This section applies only to SIMS Learning Gateway users.**

1. Create and distribute SIMS Learning Gateway accounts for new staff, students and parents.
2. Remove access to SIMS Learning Gateway from leavers, the parents of leavers (where they have no other children at the school) and staff who have left.

For full instructions, please refer to the *Removing Provisioned Users* chapter in the *SIMS Active Directory Provisioning Service* handbook.

## Running Housekeeping Routines in SIMS

Now is a good time to carry out some general housekeeping routines in SIMS. For more information, please refer to the *Setting Up and Administering SIMS* handbook.

### Importing the Key Stage 1 Wizard (Junior Schools Only)

If you have imported your new pupils via CTF, in order to see the Key Stage 1 results from your Infants school, you will need to import the Key Stage 1 wizard into SIMS Assessment. This can be achieved via **Routines | Data In | Assessment | Import**, as follows:

1. From SIMS, select **Routines | Data In | Assessment | Import** to display the **Import** wizard.
2. Click the **Field Browser** button adjacent to the **Select the file to import from** field and navigate to `C:\Program Files\SIMS\SIMS .net\AMPA\English Primary (and Middle Deemed Primary)\Assessment Manager`.
3. Highlight `Key Stage 1 Wizard England 2010.XML` then click the **Open** button.
4. The name of the selected file is displayed in the **Select the file to import from** field. Any header comments that were added to the file when it was created for export are displayed.
5. Select the **Overwrite with default values** check box if you want to update the column headings.
6. Click the **Finish** button then **Yes** to start the import process. This may take several minutes. An Activity Log is displayed when the import is complete. Click the **Close** button.