

Primary School Summary End of Year Procedures (and Promotion to the Academic Year 2011/2012)

Version 1.0

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 SIMS 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 SIMS cannot be held responsible for any changes, errors or omissions resulting from the subsequent editing of this supplied document.

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Revision History

Doc. Version	Change Description	Date
1.0	Initial Release	31/05/11

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 document 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 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"/>	Creating the new academic year on page 3.
<input type="checkbox"/>	Setting up the new academic year's pastoral structure on page 3.
<input type="checkbox"/>	Adding intake/admission groups on page 4.
<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 5.
<input type="checkbox"/>	Recording leavers on page 5.
<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 6.
<input type="checkbox"/>	Changing the Status of Applications to Offered or Accepted on page 9.
<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 13.
<input type="checkbox"/>	In SIMS Dinner Money 7 – chase outstanding debts and process refunds, enter a new catering year and any meal price changes on page 13.
<input type="checkbox"/>	In SIMS Dinner Money 7 – print Pupil Balances and Staff Balances reports and run final Banking and Catering returns on page 13.

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 15.
<input type="checkbox"/>	In SIMS Attendance - Print the Official Register for July on page 15.
<input type="checkbox"/>	In SIMS Attendance - Use the Part-Time Pupils Routine to Add Not Required Codes on page 16.
<input type="checkbox"/>	Running housekeeping routines in SIMS on page 17.

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 01/09/11 then an end date of 31/08/12 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.

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:

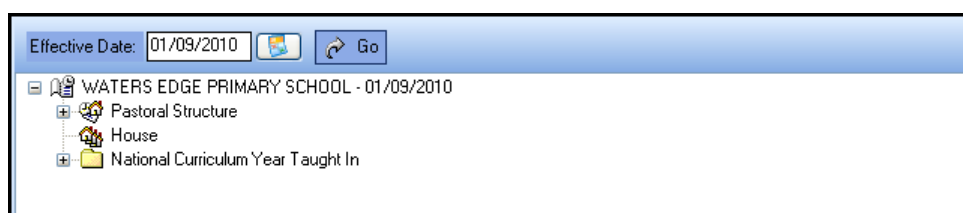
It is not essential to assign teachers to classes at this stage. This can be done when the information is known, but must be done before the start of the academic year so that Attendance records are not affected.

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 6.

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 4.

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.

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. Pupils with CTFs can be imported into an admission group or directly on-roll.

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 than 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 16 for more information.

Completed

Recording Leavers

This section provides a summary of the steps required to record leaver information in SIMS.

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.

*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.

Setup Promotion Mapping

Academic Year:
 Promote from: Academic Year 2010/2011 [Load]

Year Group

Year Group	Promotion Path

Override membership [Set Default]

Class

Year	Registration Group	Promotion Path	Supervisor	Promote Registration Tutor	Promote Other Supervisors

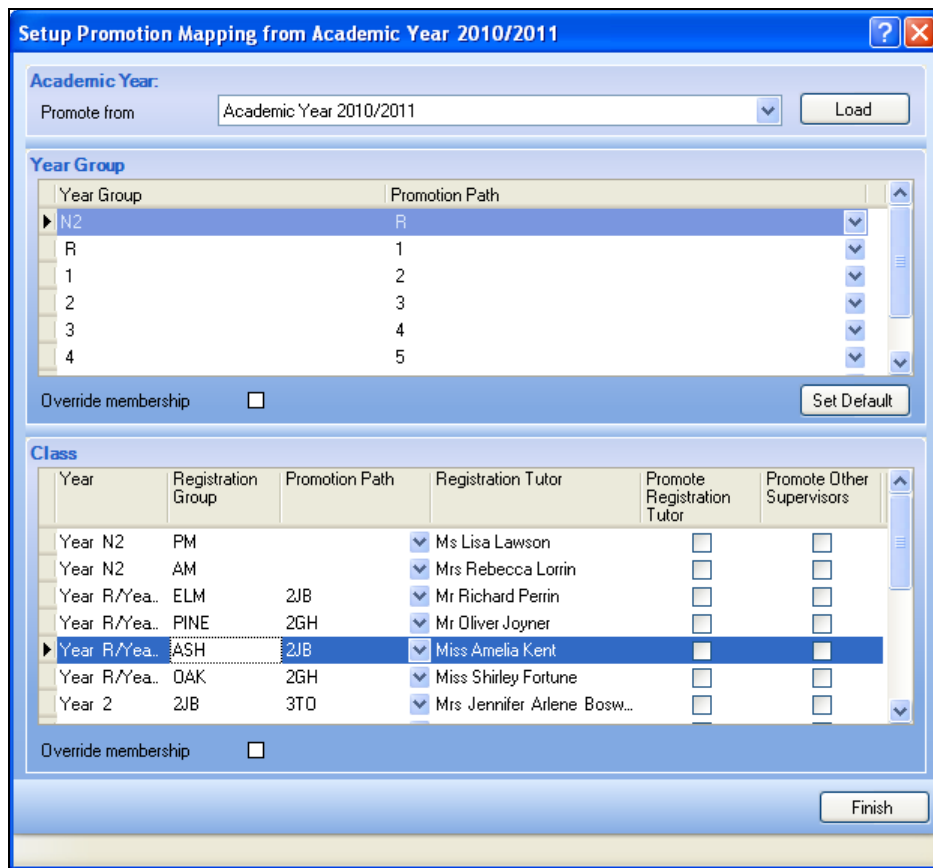
Override membership [Finish]

- The current academic year should be selected automatically from the **Promote from** drop-down list. If it is not selected automatically, select it from the drop-down list then click the **Load** 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.*

- The **Year Group** panel is populated with a default set of promotion paths (where one year is promoted to the next, i.e. Year 1 is promoted to Year 2 and so on). This is the same for both vertically or horizontally structured schools. If you wish to return to this setting at any point in the future, click the **Set Default** button.
- 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**.*



6. 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.
7. 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.
8. 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.
9. 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.

10. 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

This section describes how to change the status of applications to your school for the forthcoming academic year in bulk. Applications can be added manually or imported via ATF or CTF. When added, 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 9.
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 (01/09/2011 - 30/08/2012)

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		✓
Aaron, Liz	Female	Year N2	AM		✓
Aaron, Sophie	Female	Year N2	AM		✓
Barnes, Lucy	Female	Year N2	PM	✓	
Barnes, Tommy	Male	Year N2	PM	✓	
Chappling, Martin	Male	Year N2	PM	✓	
Dickinson, Sally	Female	Year N2	AM		✓
Eagle, Ruby	Female	Year N2	PM	✓	
Fell, Mia	Female	Year N2	AM		✓
Glass, Ella	Female	Year N2	PM	✓	
Idle, Dylan	Male	Year N2	AM		✓
Total				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. **01/09/2011** to produce lists for the new academic year.

Registration Groups (Dated) Report

Registration Groups (Dated)		
<i>Year group is Year 2 and Reg group is 2GH or 2JB</i>		
Registration Group: 2GH		
Tutor:	Mrs G Grosvenor	
Room:	n/a	
Effective date:	01/09/2011	
Name	Gender	Date of Birth
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:	31	

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: 2GH
Tutor: Mrs G Grosvenor
Room: n/a
Effective date: 01/09/2011

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:	31

Completed

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

NOTE: This process can now be carried out in SIMS using Attendance 7.

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 07/03/2011 - ELM												
Save Undo Print Codes Preserve Minutes Late Comments Vertical Links												
Previous Week Next Week Select All <input type="checkbox"/> Show only students with Unexplained Absences today												
Attendance Dinner Register												
Name	Reg	Mon 07/03		Tue 08/03		Wed 09/03		Thu 10/03		Fri 11/03		
		AM	PM	AM	PM	AM	PM	AM	PM	AM	PM	
Ackton, Stephen	ELM	/	\	I	I	I	I	/	\	/	\	
Ansell, Archie	ELM	I	I	/	\	/	\	/	\	/	\	
Barnes, Tommy	ELM	/	\	/	\	/	\	/	\	/	\	
Birch, Paige	ELM	/	\	/	\	/	\	/	\	/	\	
Chappling, Martin	ELM	/	\	/	\	/	\	/	\	/	\	
Dickinson, Sally	ELM	/	\	/	\	/	\	/	\	/	\	
Eagle, Ruby	ELM	/	\	/	\	/	\	/	\	/	\	
Elija, Denise	ELM	/	\	/	\	/	\	/	\	/	\	
Glass, Ella	ELM	/	\	/	\	/	\	I	I	I	I	
Harris, Emily	ELM	/	\	/	\	/	\	/	\	/	\	
Idle, Dylan	ELM	/	\	/	\	/	\	/	\	/	\	
Jump, Frederick	ELM	/	\	/	\	/	\	/	\	I	I	
Lewis, Nicolas	ELM	/	\	/	\	/	\	/	\	/	\	
Long, Gemma	ELM	/	\	/	\	/	\	/	\	/	\	
Malik, Yanik	ELM	/	\	/	\	/	\	/	\	/	\	
Mario, Luigi	ELM	/	\	/	\	/	\	/	\	/	\	
Mayowickz, Tamara	ELM	/	\	/	C	/	\	/	\	/	\	
Nichols, Robert	ELM	/	\	/	\	/	\	/	\	/	\	
North, Colin	ELM	/	\	/	\	/	\	/	\	/	\	
Panktar, Henna	ELM	/	\	/	\	/	\	/	\	/	\	
Patel, Nakita	ELM	/	\	/	\	/	\	/	\	/	\	
Rovoski, Vlad	ELM	I	I	/	\	/	\	/	\	/	\	
Singh, Sunita	ELM	/	\	/	\	/	\	/	\	/	\	
Smith, Alex	ELM	/	\	/	\	/	\	/	\	/	\	
Smith, Laura	ELM	/	\	/	\	/	\	/	\	/	\	
Timothy, Christian	ELM	/	\	/	\	/	\	/	\	/	\	
Uy, Shana	ELM	/	\	/	\	/	\	/	\	/	\	
Varney, Reggie	ELM	/	\	/	\	/	\	/	\	/	\	
Zinkin, Harold	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

There are no end of year processes in Dinner Money 7. However, it is advisable to reconcile pupil and staff balances, issue refunds or collect debts (where possible) before 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 (via **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.

Meal Charges Mapping

Tools | Dinner Money | Setup

Please be aware of the following, in cases where schools have mapped meal charges to classes/reg groups, rather than to either Tiers or Year groups (as the latter two are less likely to change).

It is not possible to change the meal charges mapping from, for example, classes to year groups. If schools change their class names in September, but simply rename the old class names, the existing meal definitions will continue to work with the new names.

If schools create new classes and make old classes inactive, in September an error message will be displayed when trying to enter payments because any meals recorded in the new classes will not be mapped to the existing meal definitions. Also, schools will not be able to add the new classes to the existing meal definitions/charges because the meals will have already been recorded (even if they try to delete the recorded meals).

To prevent this issue occurring, you must either:

- Create new meal definitions for the new classes, adding the meal price (with a start date before the start of term) and selecting all the new classes. This will need to be done for all active meal types, including Absent, Other School, etc. The disadvantage of this is that in future schools will need to add price changes to both meal definitions, to cover all classes.

Or

- Give all current meal charges an end date in the existing meal definitions, e.g. 31/08/2011. Enter a new meal definition, with meal charges having a start date of, e.g. 01/09/2011 and select all classes listed. You can carry on using the existing meal types, as long as the charge dates do not overlap in the meal definitions. Then append the name of the old meal definitions to include, e.g. 'Inactive'.

This must be done before the start of the new academic year.

If the new year has already started and schools have recorded meals, you can create temporary meal types and definitions for the new classes and use these to re-record the meals for the affected dates. Give all current meal charges an end date in the existing meal definitions, e.g. 31/08/2011. Enter a new meal definition, with meal charges having a start date of, e.g. 01/09/2011 and select all classes listed. You can carry on using the existing meal types, as long as the charge dates do not overlap in the meal definitions. Then append the name of the old meal definitions to include, e.g. 'Inactive'.

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 15.
- In Attendance, print the official register for July – see page 15.
- In Attendance, use the Part Time Pupils routine to add Not Required codes – see page 16.

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.

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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.

Short Name	Description
EVI	EVI
AM	AM
ELM	ELM
PINE	PINE
ASH	ASH
QAK	QAK
2IB	2IB
2GH	2GH
3TD	3TD
3CB	3CB
4ES	4ES
4SL	4SL
5BB	5BB
5DT	5DT
6VC	6VC
6KH	6KH

2. 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.

1. 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.

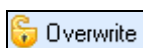
- **Apply a weekly pattern of Not Required codes**

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.

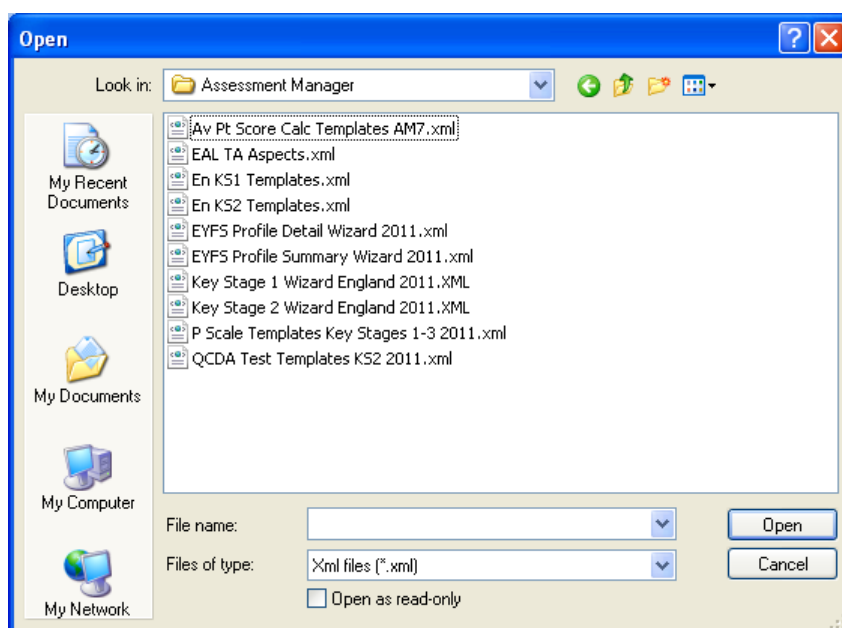
Running Housekeeping Routines in SIMS

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 2011.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.