

# End of Year Processing in SIMS

**OSMIS**  
EDUCATION

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# Introduction

In order to ensure a smooth transition to the new academic year, there are several tasks to be completed in SIMS.net, both before the end of the Summer term and at the beginning of the Autumn term.

Use the following checklist for tasks to be completed **before the end of the Summer term**.

Task	Completed
Record changes to teaching staff	
Create the new academic year	
Set up the Pastoral Structure for the new academic year	
Create Intake and Admission Groups	
Import Common Transfer Files	
Check dates for part time pupils	
Record leavers	
Export Common Transfer Files	
Set up Promotion Mapping for the new academic year	
Change the status of Applications	
Allocate Applications to registration groups	
Print class lists for the new academic year	
Print registers for the new academic year	
Deal with Unexplained Absences and Missing Marks	

Use the following checklist for tasks to be completed **at the beginning of the Autumn term**.

Task	Completed
Admit Applicants	
Re-admit any returning pupils	
Enter dates/patterns of attendance for part time pupils	
Enter Free School Meal Eligibility dates	
Run Housekeeping Routines	

# Before the End of the Summer Term

## Record Changes to Staff

All changes to your school staff need to be recorded in SIMS.net in order that the staff records are correct in both the current and new academic years.

If you have new staff joining your school, their personal information should be entered as soon as it is available. This can be done in advance of their actual starting date.

If you have staff leaving your school, the leaving information should be entered as soon as possible. This can be done in advance of their actual leaving date.

## Add New Staff

Go to **Focus > Person > Staff**, change the Status to **All** and click on **Search**. Check that the member of staff to be added is not already on the list.

The screenshot shows the SIMS.net staff search interface. The 'Status' dropdown menu is open, displaying a list of options including 'Staff, all Current', 'Teaching staff, all Current', 'Support Staff, all Current', 'Staff, all Future', 'Teaching staff, all Leavers', 'Support Staff, all Leavers', 'Staff, all Leavers', and 'All'. The 'All' option is highlighted in blue, indicating it is the selected status.

If the name is in the list, this indicates that the person has worked in your school in the past and already has a record in SIMS. Double click on the name and enter details of the new employment.

The screenshot shows the SIMS.net staff search interface with the 'Status' dropdown set to 'All'. Below the search fields is a table listing staff members. The table has columns for Name, Previous Name, Title, Gender, and Staff Code. The first row, 'Avery, Helen', is highlighted in blue.


Name	Previous Name	Title	Gender	Staff Code
Avery, Helen		Mrs	F	HA
Bates, Belinda Elisabeth		Miss	F	BEB
Boston, Sarah		Mrs	F	
Boswell, Jennifer Arlene		Mrs	F	JAB
Brooks, Carl Thomas		Mr	M	CB
Brown, Chamaine Tanita		Mrs	F	CTB
Brown, Pauline		Mrs	F	PB
Brown, Susan		Mrs	F	
Cable, Freda		Mrs	F	FC
Chard, Vicky		Mrs	F	VC


If the name you require is not in the list, click on **New** at the top of the screen and enter the Surname and click on **Continue**.

**Add Employee**

**Basic Details**

Surname  Forename

Gender  Date of Birth  



**Matched People**

The following people known to the SIMS database have similar details.  
To add a new Employee with the details entered above, select **New**.  
To add an existing person or edit a known Employee, select **Open**.

Full name	Gender	Roles	Address
Brown, Mrs Charmaine	Female	Employee, User, Teacher, ...	Canon Court North Abbey
Brown, Emily	Female	Student, Applicant	7 Peartree Walk Yaxley Pe
Brown, Mr G	Male	Contact	28 Woodland Avenue Luto
Brown, Mrs Jade	Female	Contact	7 Peartree Walk Yaxley Pe
Brown, Jeremy	Male	Student, Applicant	28 Woodland Avenue Luto
Brown, Mr John		Contact	Canon Court North Abbey .
Brown, Mrs Joy	Female	Contact	
Brown, Mrs L		Contact	47 Cricklade Road Swindo
Brown, Mr Paul	Male	Contact	7 Peartree Walk Yaxley Pe
Brown, Mrs Pauline	Female	Employee, User	47 Cricklade Road Swindo
Brown, Peter	Male	Student	

A list of matching names will be displayed. Check that the name you require is not in the list. If it is in the list, this indicates that the person already has a record in SIMS, perhaps as a Contact. Click on the name and click on **Open** to access their record and enter details of the new employment.

If it is not in the list of matching names, click on **New** on the right-hand side of the screen to open a new staff record.

Tab 1: Personal Details – Complete as much personal information as possible, including an address, telephone number and next of kin details.

Tab 3: Employment Details – If the person is a teacher, ensure that the Teaching Staff box is ticked together with the Teacher Category, Teacher Number and Qualified Teacher Status. Enter an Employment Start Date. Note that other entries such as Contracts and Checks can be entered later as you receive the information.

Employment Dates

Employment Start	Leaving Date	Cont Service Start	LA Start	Previous Employer	Next
01/09/2021					

**Save** the record and repeat the process for each new member of staff.

## Add Leaving Details

Go to **Focus > Person > Staff** and click on **Search**. Double click on the name of the person that will be leaving your school and go to Tab 3: Employment Details. In the Employment Details panel, highlight the appropriate record and click on **Open** on the right-hand side of the panel.

The screenshot shows a dialog box titled "Edit Employment History for George Davis". It contains a "Details" section with the following fields:

Employment Start Date	17/02/2020	[Calendar Icon]
Date of Leaving	29/07/2022	[Calendar Icon]
Continuous Service Start Date	17/02/2020	[Calendar Icon]
Local Authority Start Date	29/01/2018	[Calendar Icon]
Previous Employer	Brookside Comprehensive	
Next Employer		
Notes	Next employee TBC	

At the bottom of the dialog box are two buttons: "OK" and "Cancel".

Enter the Date of Leaving and click on **OK**. Click on **Save** at the top of the screen.

Repeat the process for each member of staff leaving your school.

## Create the New Academic Year

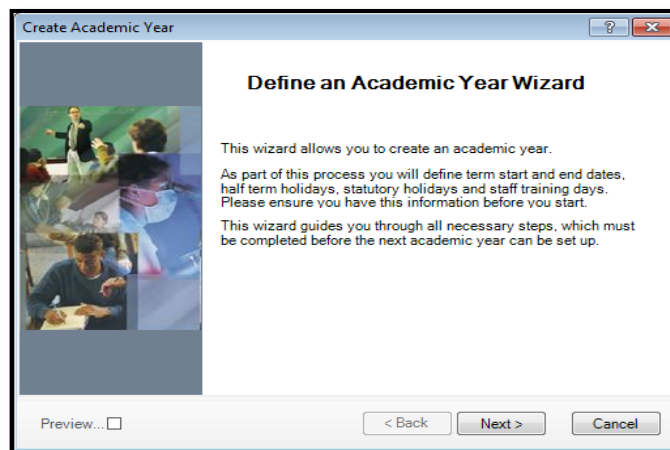
The term dates for the new academic year need to be defined, as well as half term holidays, bank holidays and staff training days. On creation of the new academic year, attendance records for each pupil are created and registers will show the dates the pupils are expected to attend school.

**It is therefore strongly recommended that all other users should be logged out of SIMS before commencing this process.**

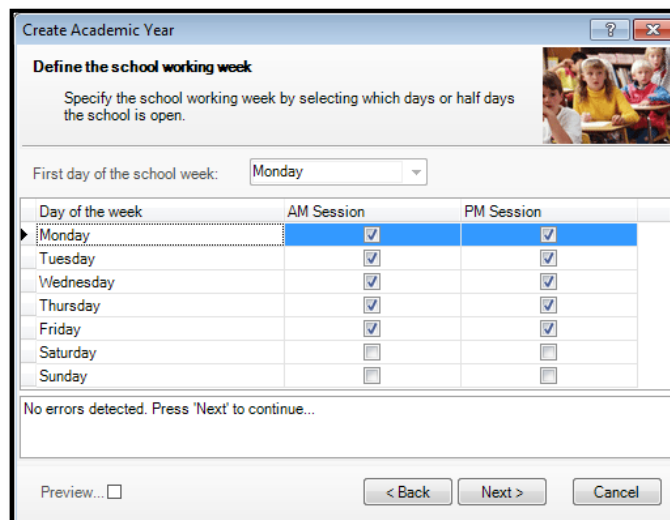
The first day of the new academic year should be set as the first day on which staff are required to attend even if the pupils are not in school, such as a staff training day.

SIMS will move smoothly into the new academic year on the first day of the Autumn term providing that the promotion process has been carried out (see page 25).

Go to **Routines> School> Academic Year** and the **Define an Academic Year Wizard** will be displayed.



Click on **Next** to display the **Define the school working week** screen.



**Check** that the morning and afternoon sessions boxes are ticked for Monday to Friday and click on **Next**. A warning message will be displayed, click on **Yes**


The **Define the terms and term holidays** for the academic year screen will now be shown.

Click on **Add Term** and enter the start and end dates for the Autumn term. Repeat for each term and note that the periods between the end of one term and the start of the next are automatically shown as holidays. **Note that in the screen below the dates are for example only – you should enter the actual term dates of your own school.**

Create Academic Year
?
×

**Define the terms and term holidays for the academic year**

Define the school terms start and end dates.



**School Terms and Holidays**

School Term	Term Start Date	Term End Date	Term Holiday
Autumn Term	30/08/2023	22/12/2023	Christmas Holiday
Spring Term	08/01/2024	28/03/2024	Easter Holiday
Summer Term	15/04/2024	25/07/2024	Summer Holiday

No errors detected. Press 'Next' to continue...

Add Term...
Remove

Preview... 
< Back
Next >
Cancel

**The first day of term should always be the first day that staff are required to attend.** For example, using the dates shown above, if 2 September is a Staff Training Day, that is the day that should be entered as the first day of term.

Click on **Next** to display the **Define the half term holidays** screen. Note that from this point onwards you can select the **Preview** button to display an additional panel on the right-hand side of the wizard showing the information you have entered throughout the process. You can deselect the Preview check box whenever you want to hide the preview panel.

Click on **Add Holiday** enter the start and end dates for the Autumn half term holiday. The description can be edited if required.


Repeat the process for each half term holiday. **Note that in the screen below the dates are for example only – you should enter the actual half term holiday dates of your own school.**



Create Academic Year
? X

### Define the half term holidays

Define the half term holidays, start and end date for every holiday. This information is optional.



Category	Start Date	End Date	Description
Half-Term	23/10/2023	27/10/2023	
Half-Term	12/02/2024	16/02/2024	
Half-Term	27/05/2024	31/05/2024	

No errors detected. Press 'Next' to continue...

Add Holiday...
Remove

Preview... 
< Back
Next >
Cancel

Click on **Next** to display the **Define teacher training days** screen. This is used to enter any training days where pupils will not be attending school.


It is advisable to enter any known INSET days at this point. Alternatively, they can be added later via the School Diary (**Focus > School > School Diary**).

Click on **Add** and select **Staff Training Day** from the **Category** drop down list. Enter the date and description of the first staff training day. Click on **OK** and repeat for other staff training days.

### Create Academic Year

**Define teacher training days**

This information is optional at this stage and can be defined later via the School Diary.



Category	Date	Description
Staff Training Day	30/08/2023	
Staff Training Day	31/08/2023	
Staff Training Day	23/07/2024	
Staff Training Day	24/07/2024	

No errors detected. Press 'Next' to continue...

Preview...


Click on **Next** to display the **Define public holidays** screen.

Click on **Add holiday** and select **Bank holiday** from the **Category** drop down list. Enter the date and description. Click on **OK** and repeat for other bank holidays if required.

Create Academic Year
?
×

**Define public holidays**

This information is optional at this stage and can be defined later via the School Diary.



Category	Date	Description
▶ Bank Holiday	06/05/2024	

No errors detected. Press 'Next' to continue...

Add holiday
Remove

Preview... 
< Back
Next >
Cancel

Note that you do not need to add a bank holiday on this screen if it happens to fall in a school holiday.


Click on **Next** to display the **Ready to create the new academic year** screen.

A summary of the data entered is displayed on the **Ready to create new academic year** screen. The detail for each term can be expanded to display its public holidays, teacher training days, etc. by clicking the applicable + icon. **You are strongly advised to check this information carefully for any errors or inaccuracies.**

### Create Academic Year

**Ready to create new academic year**

Check the new academic year dates below and press create when you are ready. This process will take some time to complete and should not be aborted once started.



- Academic Year 2023/2024
  - Autumn Term 30/08/2023-22/12/2023
    - Staff Training Day 30/08/2023
    - Staff Training Day 31/08/2023
    - Half-Term 23/10/2023-27/10/2023
  - Christmas Holiday 23/12/2023-07/01/2024
  - Spring Term 08/01/2024-28/03/2024
    - Easter Holiday 29/03/2024-14/04/2024
  - Summer Term 15/04/2024-25/07/2024
    - Summer Holiday 26/07/2024-28/08/2024

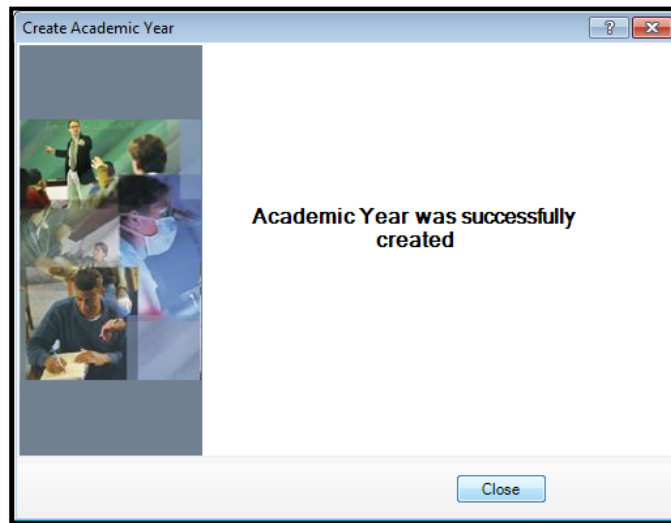
< Back   Create   Cancel

Once you are sure that the information is correct, click the **Create** button to create the new academic year. If there are any anomalies in your settings, you are asked to confirm whether you wish to proceed or review your settings. If you are certain the data is correct, you can proceed.

A warning message will be displayed. Click on **Yes**. Progress is displayed via a progress indicator at the bottom of the wizard.

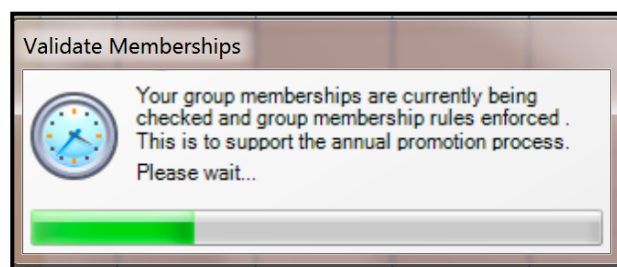


Once complete, the final page of the wizard is displayed:



Click the **Close** button to close the wizard and complete the process.

It is recommended that once you have created an academic year, you validate group memberships by selecting **Tools > Validate Memberships**, which displays the following:



The screen will close once the process has been completed.

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

The Pastoral Structure is the definition of the year and registration group organisation in your school. The structure for the new year is automatically created when the new academic year is created and is based on your current structure.

*Note that in order to accommodate academic groups in secondary schools, primary school classes are referred to as Registration Groups in SIMS.*

If your new year's structure is the same as for the current year, you need only make any changes to the staff attached to each class. 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.

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

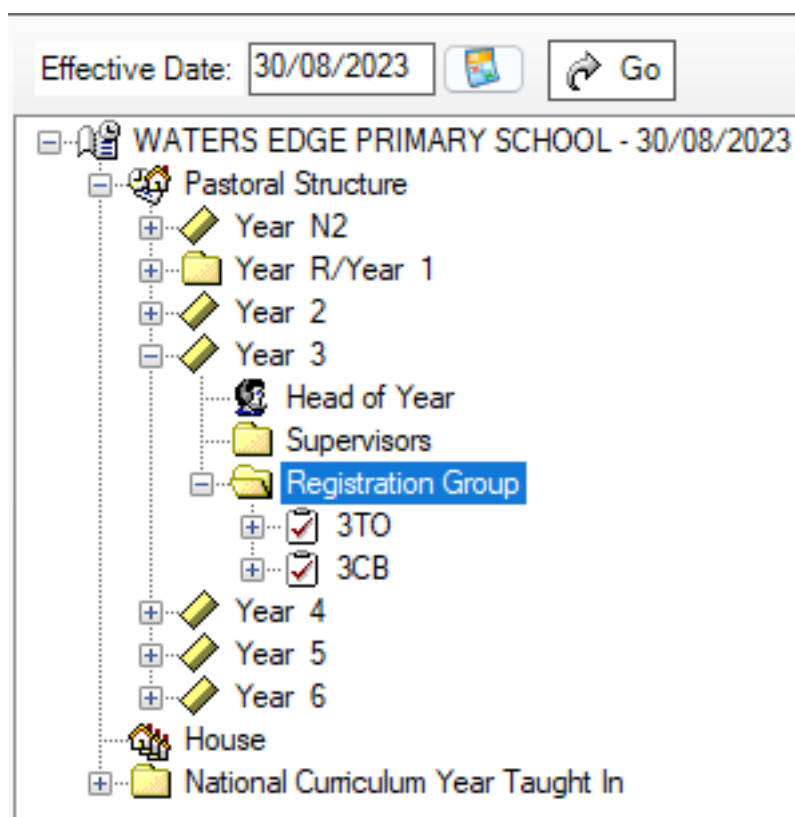
- add additional classes, where pupil numbers have increased.
- merge classes, where pupil numbers have decreased.
- add a new year group, e.g. where a Nursery has been introduced in your school.
- change class names.

If you need to change class names, you should not simply change the names in the current year as this will affect the whole history of the pupils in the class. The correct process is to go to the new year's structure and add the new classes with the appropriate name and delete the ones you no longer require.

For this reason, best advice when considering class names is as follows:

- **Do not** name your classes with teachers' names or initials, e.g. 6VC
- **Do not** name your classes according to the years they contain, e.g. Y3 or Year 3
- **Do** give your classes names that can continue year after year, e.g. Class 1, Class 2, etc, Oak, Ash, Elm, etc, Red, Blue, Green, etc

Select **Focus > School > Pastoral Structure > Next Academic Year Structure** to display the **Next Academic Year Pastoral Structure** page. The **Effective Date** field should show the first day of your new academic year and should not be changed.



The full structure can be viewed by clicking + or - icons to expand or contract the display.

### Add New Year Groups

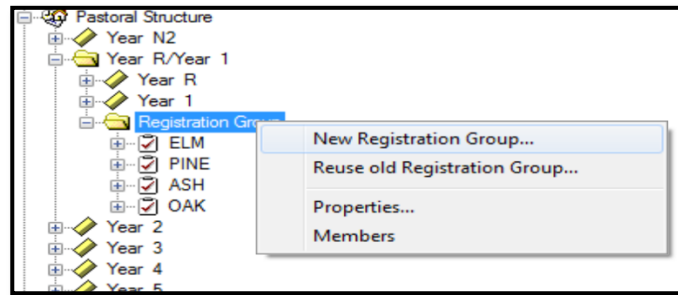
If an additional year group is required, e.g. a Nursery year has been introduced to the school, this should be added before admission groups are created to ensure that the new year group is available for selection. If this is likely to be required by your school, please contact us for further guidance.

- By email – [support@osmis.co.uk](mailto:support@osmis.co.uk)
- By telephone 0161 883 1290

### Add New Registration Groups (Classes)

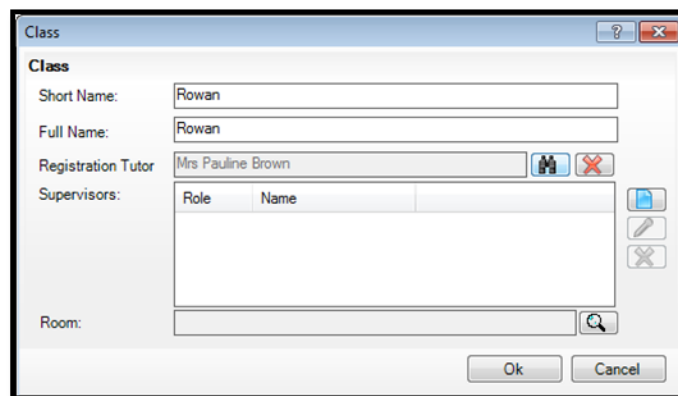
Expand the year group to which you wish to add the class by clicking the adjacent + icon.

Right click on the **Registration Group** folder and select **New Registration Group** from the pop-up menu to display the Class screen. (If you are to use a name that has been used in the past you should select **Reuse Old Registration Group** and select the name from the list shown).

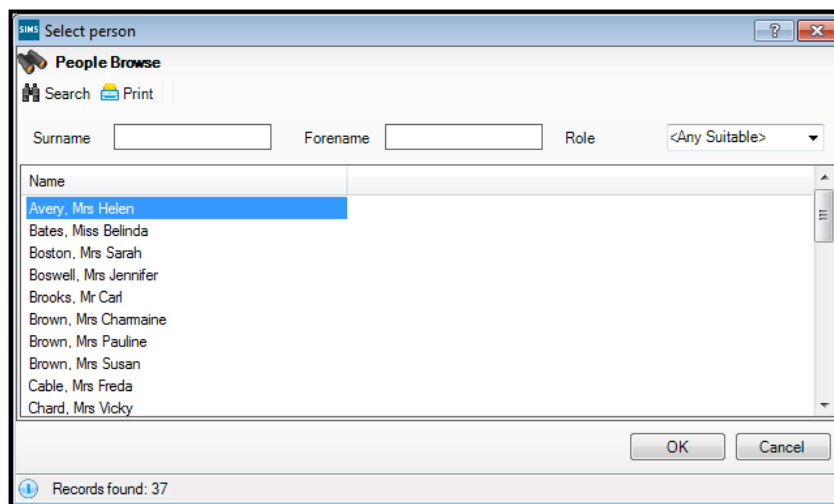


Enter a **Short Name** and a **Full Name** for the new class. (The **Full Name** is used throughout SIMS to identify the class. The **Short Name** is used for column headings in reports).

It is recommended that short names should be as short as possible – a maximum of 6 characters will appear correctly on SIMS screens and reports.



Add the **Registration Tutor** by clicking the **Browser** button to display the **Select person** dialog.



Enter a **Surname** and/or **Forename** then click on the **Search** button. Alternatively, leave the fields blank to search for all staff.

Highlight the required person and click the **OK** button to select them as the Registration Tutor and return to the **Class** dialog. Click **OK** to return to the Pastoral Structure screen.



## **Save the Amended Structure**

Once the required changes have been made to the pastoral structure, click the **Save** button to save the structure. This may take some time depending on the number of changes that have been made.

## Add 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 NOTE:** 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 it is agreed that applicants will actually arrive in school, i.e. not a teacher training day. However, please check with your Local Authority or MAT 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).

Select **Routines > Admission > Admission Groups > Setup** to display the **Find Intake Group** browser.

Click on **Search** to see the intake groups that already exist. To simplify matters please consider deleting old groups or making them inactive to hide them from the display.

Find Intake Group						
New Search Open Delete Print Browse Next Previous						
Name	<input type="text"/>	Admission Season	<Any>	Status	<Any>	
Admission Year	<Any>	Year Group	<Any>			
Name	Admission Year	Admission Season	Year Group	Planned Admission	Status	
2017/2018 - Autumn Year R	2017/2018	Autumn	Year R	40	Inactive	
2017/2018 - Autumn Year N1	2017/2018	Autumn	Year N1	8	Inactive	
2017/2018 - Spring Year 2	2017/2018	Spring	Year 2	1	Inactive	
2018/2019 - Autumn Year N2	2018/2019	Autumn	Year N2	12	Inactive	
2018/2019 - Autumn Year R	2018/2019	Autumn	Year R	40	Inactive	
2018/2019 - Autumn Year N1	2018/2019	Autumn	Year N1	8	Inactive	
2019/2020 - Autumn Year N2	2019/2020	Autumn	Year N2	20	Active	

Click the **New** button to display the **Intake Group Details** page.

Mandatory fields will be highlighted in red.

### 1 Intake Group

Admission Year	<input type="text" value="2023/2024"/>	Name	<input type="text" value="2023/2024 - Autumn Year R"/>
Admission Season	<input type="text" value="Autumn"/>	Active	<input checked="" type="checkbox"/>
Year Group	<input type="text" value="Year R"/>		
Planned Admission	<input type="text" value="30"/>		

### 2 Admission Group

Name	<input type="text" value="Reception 2023"/>
Date Of Admission	<input type="text" value="01/09/2023"/>

In the **Intake Group** panel, select the **Admission Year** to which the intake group relates (e.g., 2024/2025) from the drop-down list.

Select the required **Admission Season (Autumn, Spring or Summer)** or, if only admitting pupils in Autumn, select **Integrated** from the drop-down list.

Select the required **Year Group** the pupils will start in from the drop-down list.

Enter the number of applicants that you expect to admit to this intake group in the **Planned Admission** field (you will be able to exceed this number).

If you press the **Tab** key to move to the **Name** field or click in this field, a default name is supplied for the intake group, based on the **Admission Year, Admission Season and Year Group**, e.g., **2024/2025 – Integrated Year R**. The default name can be amended, if required.

The **Active** check box is selected by default and indicates that the intake group is available for use.

In Panel 2 enter the name of the Admission Group and the expected date of admission. Ensure that this date sits within the new academic year that was defined earlier.

Note that schools with a Nursery will need to have separate Intake and Admissions Groups set up for the Nursery and Reception years **BUT** pupils in current Nursery classes should not be placed in Admission Groups for Reception, since SIMS will automatically move Nursery pupils into Reception as part of the Promotion process.

Click the **Save** button to create the intake and admission groups.

Once admission groups have been created, you can add any applicants to SIMS and assign them to the required admission group.

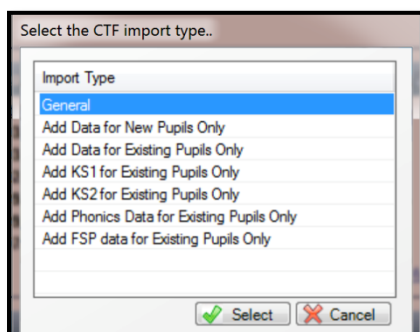
## Import Common Transfer Files

Import any CTFs that have not yet been imported. Note that pupils with CTFs can be imported into an admission group or directly on-roll.

**Pupils joining the school at a date in the future should be placed into the correct admission group and should not be placed on-roll.**

If any of the pupils in the CTF already exist in the system, any blank fields in their record will be updated with data from the CTF. Any existing data is not overwritten, as it is deemed to be the most up-to-date information. Any such information is highlighted in the Exception Log that is displayed at the end of the import process.

Select **Routines > Data In > CTF > Import CTF** to display the **Select the CTF import type** dialog. This dialog varies, depending on your school phase.



Highlight the required CTF import type then click on **Select**.

In the **Data to be Imported** panel, indicate the data items you wish to import from the CTF by selecting the appropriate check boxes.

Click on **Import**.

Pre-Admission Group	Admit On	Year Group
2019/2020 Autumn Year N1 (A)	02/09/2019	Year N1
2019/2020 Autumn Year N2(A)	02/09/2019	Year N2
2019/2020 Autumn Year R(A)	02/09/2019	Year R

In the **Import Selection** panel, browse to the location of the CTF by clicking the **Open** button adjacent to the **CTF File** field to display the **Select Import File** dialog. Navigate to the required location, highlight the CTF then click the **Open** button to return to the **Import to CTF** page.

Select **Pre-Admission** from the **Place new pupils in** drop-down list to import the pupil into an admission group. (The **On-roll** option is also available, but it is not advisable to admit future admissions directly on-roll).

Select the appropriate **Admission Group**.

**Import CTF (General)**

1 Data to be Imported 2 Import Selection 3 Exception Log

**1 Data to be Imported**

Student Basic Details  Student Address  Student Contacts  Looked After   
 SEN Information  Assessment Data  School History   
 Attendance Summary  Programme of Study(PoS) Assessments  FSM History

**2 Import Selection**

CTF File

Place new pupils in  Effective Date 23/04/2019

Pre-Admission Group	Admit On	Year Group
2019/2020 Autumn Year N1 (A)	02/09/2019	Year N1
2019/2020 Autumn Year N2(A)	02/09/2019	Year N2
2019/2020 Autumn Year R(A)	02/09/2019	Year R

Click the **Import CTF** button to start the import. Details of any errors are displayed in the Exception Log at the bottom of the **Import CTF** page.

Once you have finished importing the CTF, edit the details of the imported pupils as required.

## Check 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 schools with a Nursery, where the part time Nursery pupils move into full time Reception. However, any pupil can be marked as part-time if their attendance is anything less than 10 sessions per week.

Select **Focus > Pupil > Pupil Details** then select the required pupil from the **Find Student** browser.

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

**2 Registration**

Class: AM | House: | Year Group: Year N2 | Year Taught In: Curriculum Year N2 | Enrolment Status: Single Registration | Boarder Status: Not a Boarder | Admission Date: 01/09/2018 | Admission Number: 001651 | Former UPN: | Attendance Mode: All day | UPN: P823299918001 | Local UPN: |

**Part Time Details**

Start Date	End Date
01/09/2018	31/08/2019

**Alternative Provision Placements**

Start Date	End Date	AP Attendance	AP Sessions	AP Reason	AP Association	AP

**Early Years Attendance Patterns**

Start date	End date	Mon	Tue	Wed	Thu	Fri	Sat	Sun

Buttons: New, Open, Delete (for each table); History

Check or amend the **End Date** in the **Part Time Details** table for any part-time pupils who will no longer be part-time, by clicking the **Open** button to display the **Edit Part-time Attendance** dialog.

Add or edit the **End Date** as required then click the **OK** button. The **End Date** is then displayed in the **Part Time Details** panel.

Select **All day** from the **Attendance Mode** drop-down list.

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

## Record Leavers

The facility to record leavers enables accurate records to be retained 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/student.

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, First Language.

Select **Routines > Pupil > Leavers** to display the **Find Student(s)** browser.

Search for the required pupil then double-click their name to display the **Manage Pupil(s) Leaving Details** page.

To select a group of pupils, hold down the **Ctrl** key and click each pupil to be selected.

Once the required pupils have been highlighted, click the **Select** button to add them to the **Students** panel.

If you wish to assign a group of pupils as leavers, search on the appropriate **Year** or **Reg Group** by selecting from the appropriate drop-down lists.

The screenshot shows the 'Find Pupil(s)' interface. At the top, there are search filters: Surname, Forename, Status (set to 'On Roll'), Year Group (set to 'Year 6'), Class (set to '<Any>'), and Effective Date. Below the filters is a table with the following columns: Name, Year Group, Class, Adm. No., Date of Admission, Date of Leaving, Reason for Leaving, Destination, Expected Start, and Grounds for Removal. The table contains the following data:

Name	Year Group	Class	Adm. No.	Date of Admission	Date of Leaving	Reason for Leaving	Destination	Expected Start	Grounds for Removal
Akeman, Rebecca	6	6VC	001295	01/09/2012					
Arkell, Irene	6	6VC	001296	01/09/2012					
Astoni, Sonya	6	6VC	001297	01/09/2012					
Astwick, William	6	6VC	001215	01/09/2011					
Baker, Fiona	6	6VC	001298	01/09/2012					
Barrett, Anthony	6	6VC	001299	01/09/2012					

To select all the pupil/students displayed in the browser, select **All** from the **Select** drop-down menu.

The screenshot shows the 'Find Pupil(s)' interface with the 'Select' dropdown menu open. The menu has two options: 'All' and 'Selected'. The 'All' option is currently selected. The table below the filters is the same as in the previous screenshot:

Name	Year Group	Class	Adm. No.	Date of Admission	Date of Leaving	Reason for Leaving	Destination	Expected Start	Grounds for Removal
Akeman, Rebecca	6	6VC	001295	01/09/2012					
Arkell, Irene	6	6VC	001296	01/09/2012					
Astoni, Sonya	6	6VC	001297	01/09/2012					
Astwick, William	6	6VC	001215	01/09/2011					
Baker, Fiona	6	6VC	001298	01/09/2012					
Barrett, Anthony	6	6VC	001299	01/09/2012					

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

Select the **Reason for leaving** from the drop-down list, such as **End of phase transfer - Maintained school**.

Enter the **Destination Institution** (by clicking on the magnifying glass and searching for the relevant school) and the **Destination Expected Start Date**. The **Destination after Leaving** is a free text field which can be used but is not a compulsory field.

Highlight the pupils to which this information applies using **Ctrl** and **click**.

**1 Leaving Information**

Date of Leaving:  Reason for leaving: End of phase transfer - Maintair Assign to All

Destination after Leaving:  Assign to Selected

Destination Institution:

Destination Expected Start Date:  Grounds for Removal: L - Left School

---

**2 Students**

Name	Year Group	Class	Adm. No.	Date of Ad...	Date of Leaving	Reason fo...	Destination	Institution
Adams, Nancy	6	6VC	001460	01/09/2015	21/07/2023	End of ph...	The Big School	Green Abbey
Alala, Candis	6	6KH	001461	01/09/2015	21/07/2023	End of ph...	The Big School	Green Abbey
Barden, Olivia	6	6VC	001541	01/09/2016	21/07/2023	End of ph...	The Other Big School	West Park Secon...
Bateman, Vincent	6	6KH	001542	01/09/2016	21/07/2023	End of ph...	The Other Big School	West Park Secon...
Bhati, Aini	6	6VC	001543	01/09/2016	21/07/2023	End of ph...	The Other Big School	West Park Secon...
Boian, Claudiu	6	6KH	001544	01/09/2016	21/07/2023	End of ph...	The Big School	Green Abbey
Brown, Ingrid	6	6VC	001545	01/09/2016	21/07/2023	End of ph...	The Other Big School	West Park Secon...
Broz, Konrad	6	6KH	001462	01/09/2015	21/07/2023	End of ph...	The Big School	Green Abbey
Caims, Matthew	6	6VC	001546	01/09/2016	21/07/2023	End of ph...	The Big School	Green Abbey
Canzano, Michael	6	6KH	001547	01/09/2016	21/07/2023	End of ph...	The Other Big School	West Park Secon...
Carlton, Eleanor	6	6VC	001463	01/09/2015	21/07/2023	End of ph...	The Big School	Green Abbey
Carter, Thomas	6	6VC	001548	01/09/2016	21/07/2023	End of ph...	The Big School	Green Abbey
Chaban, Julia	6	6KH	001464	01/09/2015	21/07/2023	End of ph...	The Big School	Green Abbey
Chava, Jaden	6	6VC	001549	01/09/2016	21/07/2023	End of ph...	The Big School	Green Abbey
Chava, Sila	6	6KH	001550	01/09/2016	21/07/2023	End of ph...	The Big School	Green Abbey
Colman, Tamsin	6	6VC	001551	01/09/2016	21/07/2023	End of ph...	The Big School	Green Abbey
Cooper, Andrew	6	6KH	001466	01/09/2015	21/07/2023	End of ph...	The Bia School	Green Abbeve

Remove  
 Clear

Then click the **Assign to Selected** button. Or if the information applies to all the pupils in the list, click the **Assign to All** button.

If an error has been made, highlight the pupil, correct the information in the **Leaving Information** panel then click the **Assign to Selected** button.

To remove a pupil/student from the list, highlight their name then click the **Remove** button.

To clear the contents of the **Date of Leaving**, **Reason for Leaving** and **Destination Institution** columns in the **Students** panel, highlight the required pupils then click the **Clear** button. Re-enter the information as required.

Click the **Save** button to save the changes. The selected pupils are recorded with a date of leaving on the date specified.

Repeat the process for a group of pupils with a different Leaving Date or Destination.

Remember to **Save** your changes.

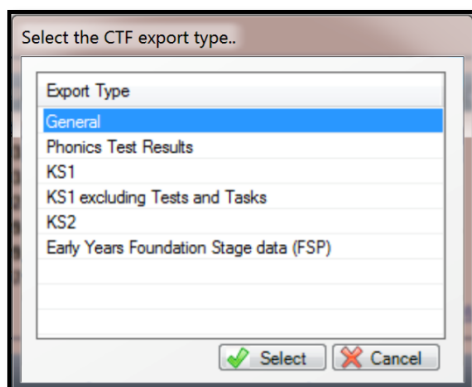


## Export Common Transfer Files

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**.*

Select **Routines > Data Out > CTF > Export CTF** to display the **Select the CTF export type** dialog.



Highlight the required CTF export type then click the **Select** button to display the **Export CTF** page.

In the **Data to be Exported** panel, ensure that the check boxes relating to the data items you wish to export are selected.

1 Data to be Exported					
Student Basic Details	<input checked="" type="checkbox"/>	Student Address	<input checked="" type="checkbox"/>	Student Contacts	<input checked="" type="checkbox"/>
SEN Information	<input checked="" type="checkbox"/>	Assessment Data	<input checked="" type="checkbox"/>	School History	<input checked="" type="checkbox"/>
		Include KS1 Tasks/Tests	<input type="checkbox"/>	FSM History	<input checked="" type="checkbox"/>
Attendance Summary	<input checked="" type="checkbox"/>	Looked After	<input checked="" type="checkbox"/>		

Select the status of the pupils you wish to include in the CTF file from the **View** drop-down list (e.g. **Current and Leavers this year**) in the **Student Options** panel.

Click the **Refresh Students** button to update the list of pupils displayed based on your selections. You can change the display order by clicking any of the column headings.

A single year group can be selected, such as Year 6. This is achieved by selecting the required year from the **Year Grp** drop-down list.

UPN	Preferred Surname	Preferred Forename	Reg Grp	Year Grp	Year Taught	Previous Destination	Destination LA/Other	Destination School
F823299918013	Abbott	Jessica	ASH	(All)				
N823299911001	Abdullah	Tamwar	5BB	(Custom)		Green Abbey		
K823299913001	Abhra	Abjit	4ES	(Blanks)		Green Abbey		
Z823299913002	Abhra	Alisha	4ES	(NonBlanks)		Green Abbey		
W823299916061	Abhra	Shaqib	ELM	1				
P823299918001	Abrams	Paul	AM	2				
D823299917001	Ackton	Charlotte	PINE	3				
C823299913004	Ackton	Stan	4SL	4				
				5				
				6				
				N1				
				N2				
				R		Green Abbey		

**2 Student Options**

Effective Date: 23/04/2019 View: Current students Include students already exported  Refresh Students

**3 Students**

UPN	Preferred Surname	Preferred Forename	Reg Grp	Year Grp	Year Taught	Previous Destination	Destination LA/Other	Destination School
P823299911021	Akeman	Rebecca	6VC	6	6	Green Abbey		Portfields Combined Sch.
D823299911022	Arkell	Irene	6VC	6	6	Green Abbey	Blackpool	
T823299911023	Astoni	Sonya	6VC	6	6	Green Abbey		Portfields Combined Sch.
J823200110061	Astwick	Wills	6VC	6	6	Green Abbey		
G823299911024	Baker	Fiona	6VC	6	6	Green Abbey		Portfields Combined Sch.
W823299911025	Barrett	Anthony	6VC	6	6	Green Abbey		Portfields Combined Sch.
K823299911026	Bassett	Joseph	6KH	6	6	Green Abbey		
Z823299911027	Benson	Zachary	6VC	6	6	Green Abbey		Portfields Combined Sch.
Y823200110062	Candy	Tilly	6KH	6	6	Green Abbey		Portfields Combined Sc.
M823200110063	Ching	Susie	6VC	6	6	Green Abbey		
N823299911028	Clarke	Anabel	6VC	6	6	Green Abbey		
B823200110064	Clover	Frederick	6KH	6	6	Green Abbey		

[Year Grp] = 6

Export CTF

If you have already created a CTF file for some of the pupils but wish to include them in this CTF, select the check box to **include pupils previously exported** (for example in a CTF sending end of Key Stage information).

Select the **Destination LA/Other** or **Destination School** by clicking in the appropriate cell then selecting from the drop-down list. This can be done on an individual basis or you can select multiple pupil by holding down the **Ctrl** key and clicking each pupil to be selected.

To select all the pupils, right-click anywhere in the table then select **Select All** from the pop-up menu.

Click the **Export CTF** button to create the export file.

After the file has been created, any errors are displayed in the **Exception Log** panel, together with the number of pupils in the file, the number processed, and the number not exported.

Any errors causing the export to fail must be corrected before the pupils can be successfully included in the CTF export file.

Navigate to the location of the **CTF Export Directory** (as defined in **Tools > Setups > CTF**) then identify the newly created XML file for export. The CTF can be transferred by a local secure file transfer or S2S. Please contact your Local Authority if you are unsure how to transfer the CTF.

## Set up 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 if there are any exceptions (such as a pupil not moving into the same class or year as everyone else).

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 new academic year.**

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

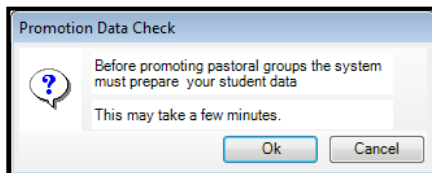
**BEFORE PROCEEDING:** Please check that you have carried out the following:

*Recorded any changes to teaching staff (added new teachers and added dates of leaving for any leavers).*

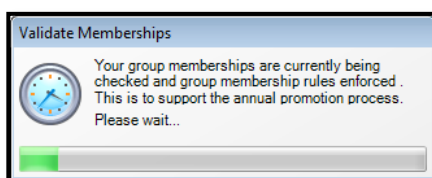
*Created the new academic year.*

*Amended the new year's pastoral structure as required, such as adding new classes.*

Select **Routines > School > Promotion** to display the **Promotion Data Check** dialog. You are advised that pupil data needs to be prepared (all current group memberships are checked and confirmed).



Click the **Ok** button to display the **Validate Memberships** message dialog, which shows the progress of the validation process.



This process may take some time to complete. Once the validation process is complete, the **Setup Promotion Mapping** dialog is displayed.

The current academic year should be shown automatically in the **Promote from** field.

If it is not selected automatically, select it from the drop-down list.

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).

Year Group	Promotion Path
N1	N2
N2	R
R	1
1	2
2	3

Override membership  Set Default

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**.

The **Class** panel will show the classes associated with each year group. These can be changed if required by clicking in the Promotion Path cell and selecting a different class.

Year	Registration Group	Promotion Path	Registration Tutor	Promote Registration Tutor	Promote Other Supervisors
Year N1	N1 AM	AM	Ms Lisa Lawson	<input type="checkbox"/>	<input type="checkbox"/>
Year N1	N1 PM	PM	Mrs Rebecca Lorrin	<input type="checkbox"/>	<input type="checkbox"/>
Year N2	PM	ELM	Ms Lisa Lawson	<input type="checkbox"/>	<input type="checkbox"/>
Year N2	AM	PINE	Mrs Rebecca Lorrin	<input type="checkbox"/>	<input type="checkbox"/>
Year R/Yea..	ELM	PINE	d Perrin	<input type="checkbox"/>	<input type="checkbox"/>
Year R/Yea..	PINE	ASH	Lowner	<input type="checkbox"/>	<input type="checkbox"/>
		OAK			

Override membership  Finish

To facilitate the identification of year group names, you can drag the dividing line of the column heading to increase the size of the **Year** column.

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.

The **Registration Tutor** column displays the name of the current class tutor. 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.

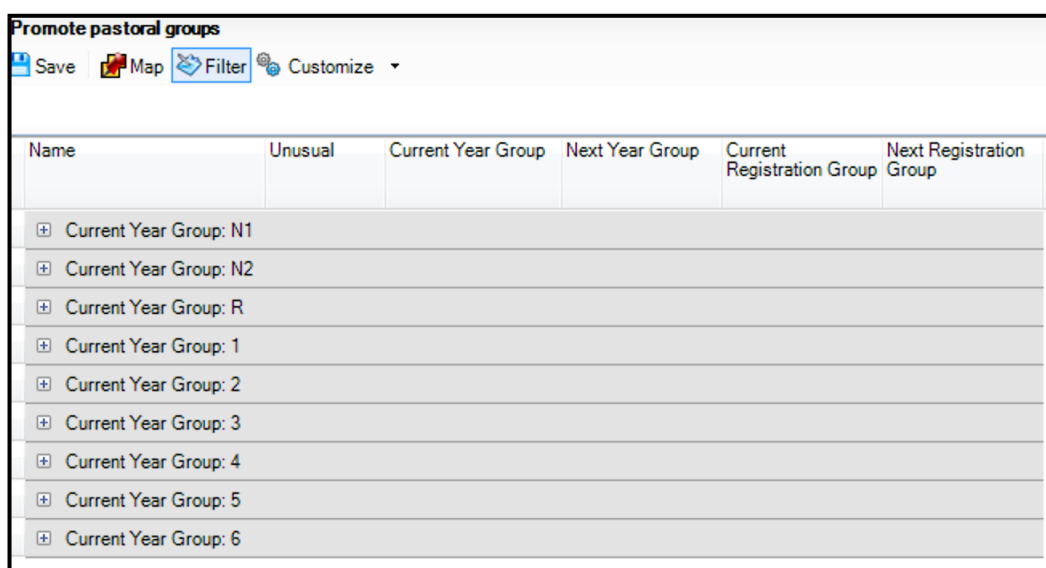
Select the **Override Membership** check box in both the **Year Group** and **Class** panels the first time you carry out the promotion mapping process. This ensures that any existing memberships (however they were defined) are overwritten. If you repeat the promotion process, you can decide whether to overwrite the existing memberships by selecting the check box as required. For example, if you had originally stated that pupils in the **Pine** class should be promoted to the **Ash** class and subsequently wanted them to go from **Pine** to **Oak**, you would need to select the **Override Membership** check box in the **Class** panel.

**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 **Finish** button to save the settings.

Click the **Map** button on the toolbar at any point to return to the **Setup Promotion Mapping** dialog.

SIMS displays the **Promote Pastoral Groups** page, which lists the current year groups.



Name	Unusual	Current Year Group	Next Year Group	Current Registration Group	Next Registration Group
+ Current Year Group: N1					
+ Current Year Group: N2					
+ Current Year Group: R					
+ Current Year Group: 1					
+ Current Year Group: 2					
+ Current Year Group: 3					
+ Current Year Group: 4					
+ Current Year Group: 5					
+ Current Year Group: 6					

## Set the Promotion Path for Individual Pupils

It is sometimes the case that a pupil is not to be promoted along with the rest of the class.

Click on the plus sign next to the current year group which you wish to view or set individual promotion paths, to view the promotion path for each pupil.

Once expanded, you can change the year or class for individual pupils by clicking in the appropriate column and selecting a different year or class from the drop-down list. The change appears in red and the **Unusual** check box is selected automatically to indicate that the change falls outside the normal mapping set previously (using the **Setup Promotion Mapping** dialog).

Name	Unusual	Current Year Group	Next Year Group	Current Registration Group	Next Registration Group
+ Current Year Group: N1					
+ Current Year Group: N2					
+ Current Year Group: R					
+ Current Year Group: 1					
- Current Year Group: 2					
Adams, Nancy	<input type="checkbox"/>	2	3	2JB	3TO
Alala, Candis	<input type="checkbox"/>	2	3	2GH	3CB
Barden, Olivia	<input checked="" type="checkbox"/>	2	3	2JB	3TO
Bateman, Vincent	<input type="checkbox"/>	2	3	2GH	3TO
Bhati, Aini	<input type="checkbox"/>	2	3	2JB	3TO
Boian, Claudiu	<input type="checkbox"/>	2	3	2GH	3CB
Brown, Ingrid	<input type="checkbox"/>	2	3	2JB	3TO
Broz, Konrad	<input type="checkbox"/>	2	3	2GH	3CB
Cairns, Matthew	<input type="checkbox"/>	2	3	2JB	3TO
Canzano, Michael	<input type="checkbox"/>	2	3	2GH	3CB
Carlton, Eleanor	<input type="checkbox"/>	2	3	2GH	3CB
Carter, Tom	<input type="checkbox"/>	2	3	2JB	3TO

Repeat the process for any other pupils, if required.

Multiple pupil/students can be highlighted by holding down the **Ctrl** key then clicking each pupil you wish to select.

**NOTE:** If the **Filter** button at the top left of the screen is deselected, all Year Groups and classes are available for selection from the drop-down lists, not just those that are associated with the chosen **Year Group** or **Class**.

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

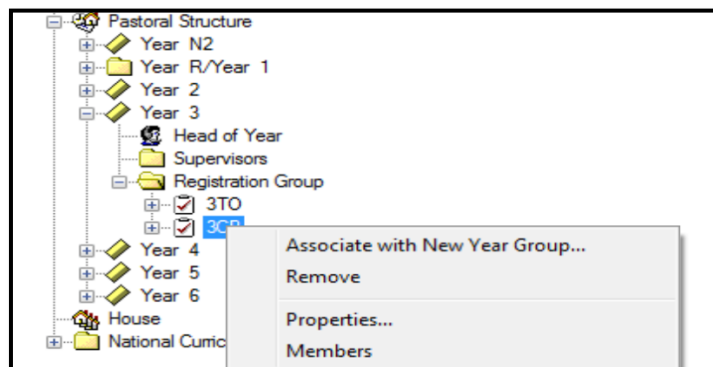
## Check Registration Tutors

Once the promotion mapping process is complete, you are strongly advised to check the registration group assignments in the pastoral structure.

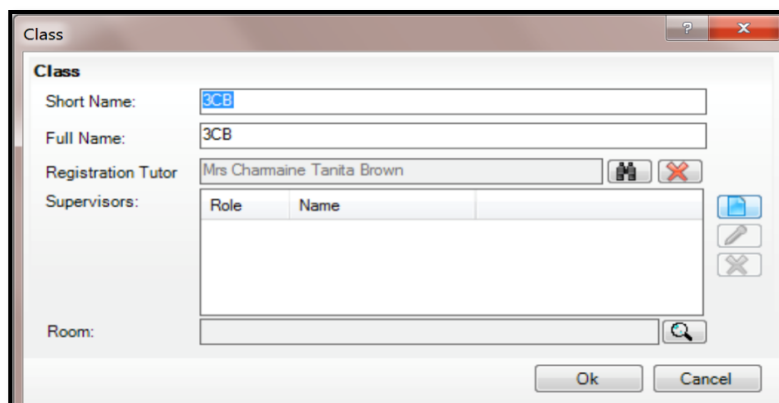
Select **Focus > School > Pastoral Structure > Next Academic Year Structure**.

Click the + icon adjacent to **Pastoral Structure** to reveal each registration group.

Right-click the name of each registration group and select **Properties** from the pop-up menu to display the **Class** dialog.



The **Class** screen will be displayed:



If necessary, add or change the **Registration Tutor** by clicking the **Browser** button, searching for then selecting the required person. Click the **OK** button.

If two registration tutors share the group, click the **New** button adjacent to the **Supervisors** panel to display the **Supervisor Properties** table. Select the **Role** of **Joint Main Supervisor** from the drop-down list then select the required person by clicking the **Browser** button then searching for and selecting the required person from the **Select person** dialog. Click the **OK** button to confirm the selection.

Click the **OK** button to return to the pastoral structure then click the **Save** button once you have assigned all the required registration tutors.

## Change the Status of Applications

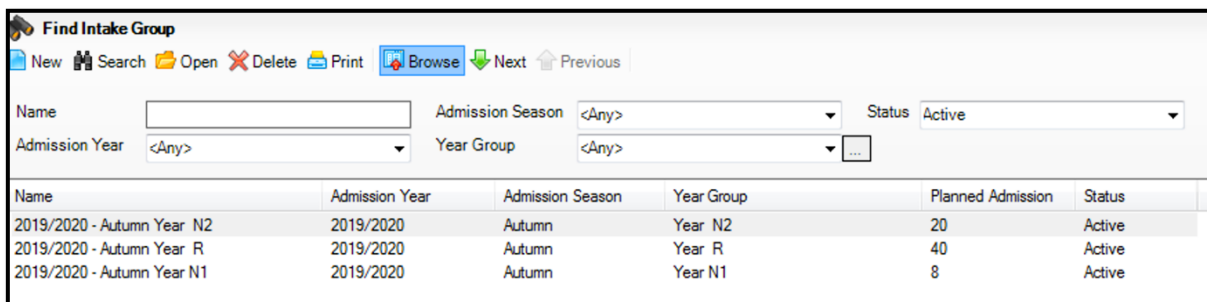
Applications can be added manually or imported via CTF. When added, an application is automatically given a status of **Applied**. If required, you can then offer places to applicants you wish to join your school (**Offered**) and then change the status of the application to **Accepted** once you have 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.

If your offer of a place at your school is refused, you can change the status to **Withdrawn**. This means that although that pupil will not be included in any admission process or class lists, their details will be held in SIMS in case they subsequently arrive at your school.

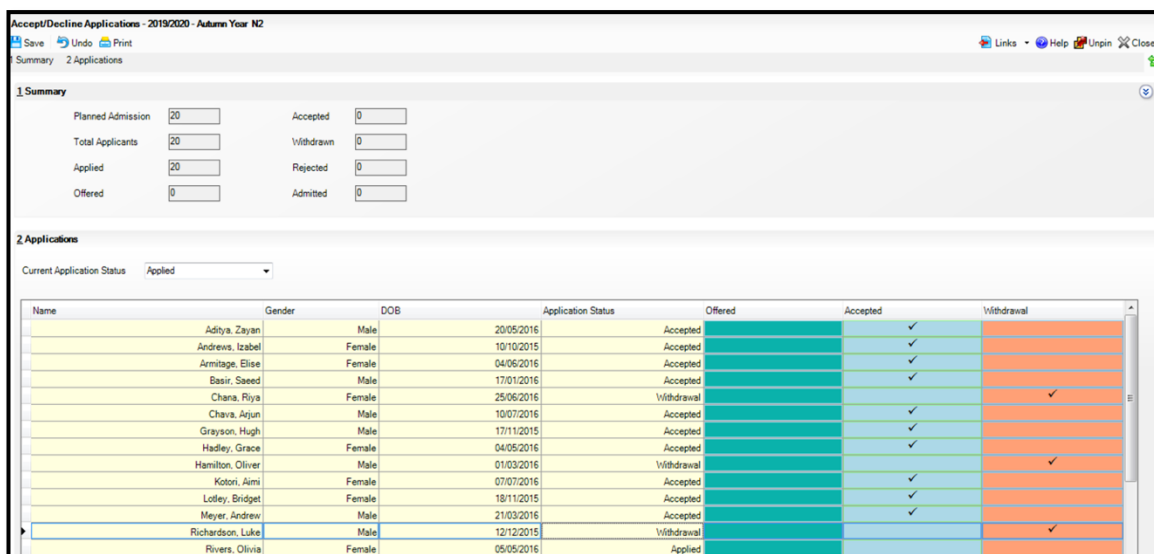
## Accepting Applicants

This section describes how to record applicants who have accepted a place at your school. This is achieved by changing the application status to **Accepted**.

Select **Routines > Admission > Accept Applications** to display the **Find Intake Group** browser.



Search for then double-click the required intake group to display the **Accept/Decline Applications** page.





The **Summary** panel displays figures for the **Planned Admission**, **Total Applicants** and the number of applicants who have **Applied** for, or been **Offered**, a place at your school.

Figures for the number of places **Offered**, **Accepted**, **Withdrawn**, (Independent schools only) are updated as applicable information is edited and saved.

The **Applications** panel displays by default, all applicants with an application status of **Offered**. This can be changed by clicking on the down arrow and selecting the appropriate option.

The display includes the **Name**, **Gender**, date of birth (**DOB**) and **Application Status** of each applicant, together with a tick grid that enables the application status to be amended.

Click the **Accepted** column for each applicant who has accepted a place at your school. To accept, click in the cell to put a tick in it. To withdraw, click the **Withdrawal** column.

If you wish to accept applicants with a status of **Applied**, select **Applied** from the **Current Application Status** drop-down list and follow this same process.

Once complete, click the **Save** button to save the changes. The **Application** panel refreshes its display and shows only those applicants with an application status matching that selected in the **Application Status** drop-down list. In most cases, the list will be empty.

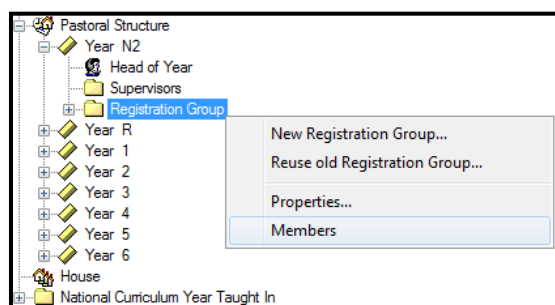
## Allocate Applicants to Registration Groups/ Classes

Select **Focus > School > Pastoral Structure > Next Academic Year Structure** to display the **Next Academic Year Pastoral Structure** page.

The **Effective Date** defaults to the start date of the next academic year. Changes to the structure can only be made with the default date showing.

However, the date can be changed if you wish to view pupils who will be joining the school at a later date (e.g., Nursery or Reception pupils due to start later than the rest of the school).

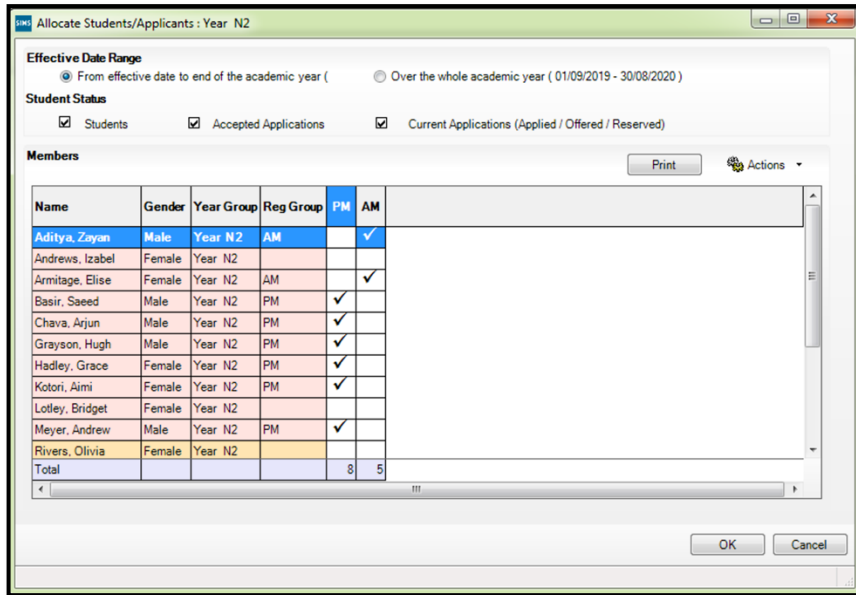
Expand the **Pastoral Structure** until the **Registration Group** folder is visible under the required year.



Right-click the applicable **Registration Group** folder and select **Members** from the pop-up menu to display the **Allocate Students/Applicants** dialog.

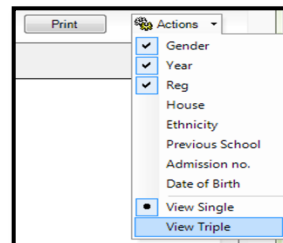
The **Name**, **Gender**, current **Year Group** and current **Reg Group** are displayed for each applicant together with the total number of applicants allocated to each class (at the bottom of the grid). Right-click any column heading to change the order.

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.



*NOTE: Although you can specify which class the applicants will go in, the applicants must be admitted (via **Routines > Admission > Admit Applications**) before they become a member of this class.*

Click on **Actions** to select additional columns or to change the view to **View Triple Totals** (which displays a breakdown of totals for females and males in each group).



**SIMS Allocate Students/Applicants : Year N2**

**Effective Date Range**  
 From effective date to end of the academic year ( )  Over the whole academic year ( 01/09/2019 - 30/08/2020 )

**Student Status**  
 Students  Accepted Applications  Current Applications (Applied / Offered / Reserved)

**Members** Print Actions ▾

Name	Gender	Year Group	Reg Group	Ethnicity	DOB	PM	AM
Andrews, Izabel	Female	Year N2		White - English	10/10/2015		
Grayson, Hugh	Male	Year N2	PM	White - English	17/11/2015	✓	
Lotley, Bridget	Female	Year N2		White - English	18/11/2015		
Elverdon, Astrid	Female	Year N2	AM	White - English	27/11/2015		✓
Sawyer, George	Male	Year N2	AM	White - English	08/12/2015		✓
Thomsone, Adeline	Female	Year N2	PM	White and Black African	14/12/2015	✓	
Joram, Sara	Female	Year N2	PM	Arab	07/01/2016	✓	
Basir, Saeed	Male	Year N2	PM	Asian and any other ethnic group	17/01/2016	✓	
Roslyn, Laura	Female	Year N2	AM	White - English	30/01/2016		✓
Male						7	5
Female						4	4
Total						11	9

OK Cancel

Once you have selected classes for each applicant, click the **OK** button to save the changes.

## Print Class Lists for the New Academic Year

Class (Registration Group) lists for the new year can be easily produced in advance 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)

Select **Reports > Run Report** to display the **Report** browser.

Expand the **Student** focus and double-click the required pre-defined report, e.g. **Registration Groups (Dated)** to display the **Enter parameter values for report** dialog.

Enter parameter values for report

Supply Effective date

04/10/2023

Bypass effective date (Use Today)

Select Year Group(s)

Accept All (bypass filter condition)

Year N2

Year R

Year 1

Year 2

Year 3

Select Registration Group(s)

Accept All (bypass filter condition)

PM

AM

ELM

PINE

ASH

OK Cancel

Deselect the **Bypass effective date** check box.

Enter the required date, which should be a date **when all pupils will be attending**.

Select the required **Year Group(s)** and **Registration Group(s)** then click the **OK** button to produce the required report.

**Registration Groups (Dated) Report**

Registration Groups (Dated)

**Registration Groups (Dated)****Registration Group:****Tutor:****Room:** n/a

Effective date: 03/09/2021

Name	Gender	Date of Birth
Abbas Latif	M	11-11-2016
Abbott Jessica	F	17-02-2014
Abhra Abjit	M	20-11-2009
Abhra Alisha	F	20-11-2009
Abhra Shaquib	M	17-12-2013
Abrams Paul	M	15-12-2014
Ackton Charlotte	F	10-02-2014
Ackton Stan	M	22-03-2010
Adams Nancy	F	18-12-2011
Adams Sadie	F	20-03-2013
Aditya Zayan	M	20-05-2016
Ainsley Charlotte	F	02-05-2015
Akeman Richard	M	02-02-2011
Akeman Steven	M	02-02-2011
Alala Candis	F	02-10-2011
Alala Michael	M	12-04-2014
Alamilla Sofia	F	02-12-2010

**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.

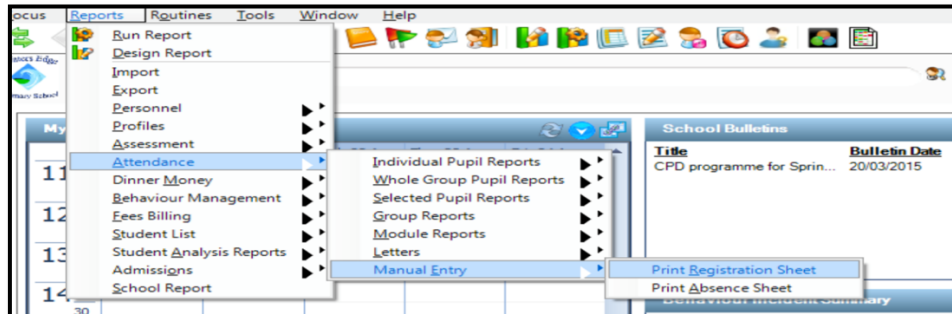
**Registration Group (Dated – With Columns)**

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

## Print Registers for New Academic Year

Manual Attendance registers for the first week of term can be printed in advance if required.

Go to **Reports > Attendance > Manual Entry > Print Registration Sheet**



Set the dates at the top of the screen to the **first week of the Autumn term** and tick the box to **Include accepted applicants**. In the lower part of the screen select the classes required or **Select All**.

**Manual Entry Register**

Search

From w/b  to w/b  Group Type

Title

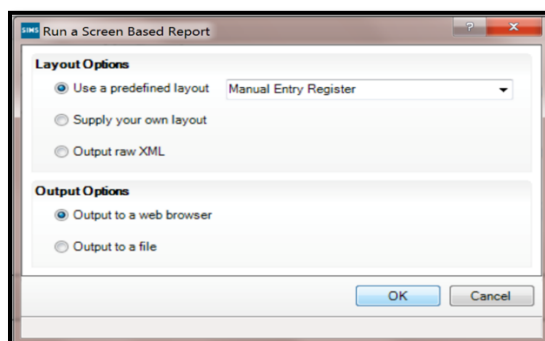
Include accepted applicants

Include Existing Marks

Display Attendance Codes

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

The **Run a Screen based Report** screen will be displayed. Do not change any of the default settings and click on **OK**.



The selected registers will be displayed on screen and can be printed.

## Deal with Unexplained Absences and Missing Marks

It is important to ensure that you clear any missing marks and unexplained absences on a regular basis. Attendance information is collected in each termly School Census.

Go to **Focus: Attendance: Deal with Missing Marks**. Set the date range and the Group Type to **Whole School**, click on **Search** and then double click on Whole School Selected. If you have any missing marks, the pupil names will be displayed with the dates and sessions of the missing marks. Enter the correct mark in the end column and **Save** your changes until the screen is empty.

Go to **Focus: Attendance: Deal with Unexplained Absences**. Set the date range and the Group Type to **Whole School**, click on **Search** and then double click on Whole School Selected. If you have any unexplained absences (N code), the pupil names will be displayed with the dates of the N code. Enter the correct mark in the end column and **Save** your changes until the screen is empty.

# At the Beginning of the Autumn Term

## Admit 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.

Select **Routines > Admission > Admit Applications** to display the **Find Intake Group** browser.

Name	Admission Year	Admission Season	Year Group	Planned Admission	Status
2021/2022 - Autumn Year N2	2021/2022	Autumn	Year N2	20	Active
2021/2022 - Autumn Year R	2021/2022	Autumn	Year R	40	Active
2022/2023 - Autumn Year N2	2022/2023	Autumn	Year N2	300	Active
2022/2023 - Autumn Year R	2022/2023	Autumn	Year R	40	Active

Search for and then double-click the required intake group to display the **Admit Applicant Detail** page.

The **Summary** panel displays read-only statistics about the selected intake group.

The **Applications** panel displays by default, all applicants with an application status of **Accepted**.

Name	Gender	Date Of Birth	Date Of Admission	Enrolment Status	Application Status	UPN	Assign UPN	Admitted	Withdrawal
Aditya, Zayan	Male	20/05/2016	02/09/2019	Single Registration	Accepted		No Change		
Andrews, Izabel	Female	10/10/2015	02/09/2019	Single Registration	Accepted		No Change		
Armitage, Elise	Female	04/06/2016	02/09/2019	Single Registration	Accepted		No Change		
Basir, Saeed	Male	17/01/2016	02/09/2019	Single Registration	Accepted		No Change		
Chava, Arjun	Male	10/07/2016	02/09/2019	Single Registration	Accepted		No Change		
Grayson, Hugh	Male	17/11/2015	02/09/2019	Single Registration	Accepted		No Change		
Hadley, Grace	Female	04/05/2016	02/09/2019	Single Registration	Accepted		No Change		
Kotori, Aimi	Female	07/07/2016	02/09/2019	Single Registration	Accepted		No Change		
Lotley, Bridget	Female	18/11/2015	02/09/2019	Single Registration	Accepted		No Change		
Meyer, Andrew	Male	21/03/2016	02/09/2019	Single Registration	Accepted		No Change		

The display includes the **Name, Gender, Date of Birth**, proposed **Date of Admission, Enrolment Status, Application Status, UPN** and whether a UPN will be assigned. A tick grid is provided, enabling the application status to be amended as required. The order of the display can be changed by clicking any column heading.

If you wish to admit applicants with a different application status (such as **Offered**) select it from the **Application Status** drop-down list, then follow the remainder of this process.

If you need to add UPNs, click the **Assign Permanent UPN** button. The **Assign UPN** column is then populated with **Assign Permanent UPN**, as shown in the following graphic.



Name	Gender	Date Of Birth	Date Of Admission	Enrolment Status	Application Status	UPN	Assign UPN	Admitted	Withdrawal
Aditya, Zayan	Male	20/05/2016	02/09/2019	Single Registration	Accepted		Assign Permanent..		
Hadley, Grace	Female	04/05/2016	02/09/2019	Single Registration	Accepted		Assign Permanent..		
Kotori, Aimi	Female	07/07/2016	02/09/2019	Single Registration	Accepted		Assign Permanent..		
Lotley, Bridget	Female	18/11/2015	02/09/2019	Single Registration	Accepted		Assign Permanent..		
Meyer, Andrew	Male	21/03/2016	02/09/2019	Single Registration	Accepted		Assign Permanent..		
Andrews, Izabel	Female	10/10/2015	02/09/2019	Single Registration	Accepted		Assign Permanent..		
Armitage, Elise	Female	04/06/2016	02/09/2019	Single Registration	Accepted		Assign Permanent..		
Basir, Saeed	Male	17/01/2016	02/09/2019	Single Registration	Accepted		Assign Permanent..		
Chava, Arjun	Male	10/07/2016	02/09/2019	Single Registration	Accepted		Assign Permanent..		
Grayson, Hugh	Male	17/11/2015	02/09/2019	Single Registration	Accepted		Assign Permanent..		

To edit individual applicants, select the required value from the drop-down list in the **Assign UPN** column, e.g. **No Change** (if the applicant already has a UPN) or **Assign Temporary UPN**.

Name	Gender	Date Of Birth	Date Of Admission	Enrolment Status	Application Status	UPN	Assign UPN	Admitted	Withdrawal
Aditya, Zayan	Male	20/05/2016	02/09/2019	Single Registration	Accepted		Assign Permanent..		
Hadley, Grace	Female	04/05/2016	02/09/2019	Single Registration	Accepted		No Change		
Kotori, Aimi	Female	07/07/2016	02/09/2019	Single Registration	Accepted		Assign Permanent..		
Lotley, Bridget	Female	18/11/2015	02/09/2019	Single Registration	Accepted		Assign Permanent..		
Meyer, Andrew	Male	21/03/2016	02/09/2019	Single Registration	Accepted		Assign Permanent..		
Andrews, Izabel	Female	10/10/2015	02/09/2019	Single Registration	Accepted		No Change		
Armitage, Elise	Female	04/06/2016	02/09/2019	Single Registration	Accepted		No Change		
Basir, Saeed	Male	17/01/2016	02/09/2019	Single Registration	Accepted		No Change		
Chava, Arjun	Male	10/07/2016	02/09/2019	Single Registration	Accepted		No Change		
Grayson, Hugh	Male	17/11/2015	02/09/2019	Single Registration	Accepted		No Change		

Note that Permanent UPNs should only be assigned to new applicants when it is believed that they have never previously been allocated a UPN. That is, if they have never attended a maintained school or Nursery in England or Wales.

Temporary UPNs are issued to an applicant only when a school does not know their permanent UPN (e.g. the school is awaiting a transfer file or awaiting an applicant’s information).

**IMPORTANT NOTE:** UPN information is required for School Census. This is the only opportunity to bulk allocate UPNs. If you do not generate them here, you will need to allocate UPNs on an individual basis via the **Pupil Details** page.

Any known existing UPNs can be entered in the **Basic Details** panel by clicking the **Application** icon on the toolbar or by selecting **Focus > Admission > Applicant**.

If you intend to admit all the applicants in the selected intake group, click the **Admit All** button. Alternatively, click in the **Admitted** column adjacent to each applicant you wish to admit.

Name	Gender	Date Of Birth	Date Of Admission	Enrolment Status	Application Status	UPN	Assign UPN	Admitted	Withdrawal
Aditya, Zayan	Male	20/05/2016	02/09/2019	Single Registration	Admitted		Assign Permanent..	✓	
Armitage, Elise	Female	04/06/2016	02/09/2019	Single Registration	Admitted		Assign Permanent..	✓	
Hadley, Grace	Female	04/05/2016	02/09/2019	Single Registration	Admitted		Assign Permanent..	✓	
Kotori, Aimi	Female	07/07/2016	02/09/2019	Single Registration	Withdrawal		Assign Permanent..		✓
Lotley, Bridget	Female	18/11/2015	02/09/2019	Single Registration	Admitted		Assign Permanent..	✓	
Andrews, Izabel	Female	10/10/2015	02/09/2019	Single Registration	Admitted		Assign Permanent..	✓	
Basir, Saeed	Male	17/01/2016	02/09/2019	Single Registration	Admitted		Assign Permanent..	✓	
Chava, Arjun	Male	10/07/2016	02/09/2019	Single Registration	Admitted		Assign Permanent..	✓	
Grayson, Hugh	Male	17/11/2015	02/09/2019	Single Registration	Admitted		Assign Permanent..	✓	
Meyer, Andrew	Male	21/03/2016	02/09/2019	Single Registration	Admitted		Assign Permanent..	✓	

Click in the **Withdrawal** column for any Applicant who will not be coming to your school.

Once complete, click the **Save** button to admit the applicants.

The **Application** panel refreshes its display and shows only those applicants with an application status matching that selected in the **Application Status** drop-down list. If you have admitted all your applicants, the list will be empty.

## Re-Admit Returning 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 NOTE:** Do not remove the **Date of Leaving** as a method of re-admitting.

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).

Select **Focus > Pupil (or Student) > Pupil Details** to display the **Pupil Details** page. Click the **New** button to display the **Add Student** page.

Enter the pupil's surname into the **Basic Details** panel then click the **Continue** button. A list of **Matched People** will be displayed.

Highlight the required pupil and click on the **Open** button to display a warning message **The selected student is a Leaver; do you want to re-admit the student?**

If you are certain that this is the pupil who should be re-admitted, click the **Yes** button to display the pupil's details.

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.

Click the **Save** button again if any additional data has been added.

## Enter Patterns of Attendance for Part Time Pupils

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.

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

To ensure that the required menu route is available, go to **Tools > Setups > Attendance Setup > Module Setup** and select the **Show Part-time Pupils** check box in the **Visibility Switches** panel. **Save** your changes and close the screen.

Go to **Tools > Setups > Attendance Setup > Part Time Pupils** to display the **Part Time Pupils** page.

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.**

Note that the **Group Type** can be altered by clicking on the down arrow (for example to set a part time pattern for individual pupils rather than a whole reg group).

**Part Time Pupils**

Search  Preserve  Apply

From w/b  to w/b  Group Type

Name	Year Group	Reg. Group	House	Sex	Admission Number
Abbas, Latif	1	ELM		Male	001780
Abbott, Jessica	4	4ES		Female	001663
Abhra, Shaquib	4	4ES		Male	001582
Abrams, Paul	3	3TO		Male	001651
Ackton, Charlotte	4	4SL		Female	001590
Ackton, Simon	1	PINE		Male	001860
Adams, Sadie	5	5DT		Female	001521
Aditya, Zayan	2	2GH		Male	001751
Ainsley, Charlotte	3	3CB		Female	001711
Alala, Michael	4	4SL		Male	001664
Alberts, Courtney	3	3CB		Female	001652
Alyona, Tatyana	5	5DT		Female	001522
Andrews, Ching	3	3TO		Male	001712
Andrews, Izabel	2	2JB		Female	001752
Andrews, Meili	1	OAK		Female	001781
Andrews, Melissa	1	PINE		Female	001782
Andrews, Richard	5	5DT		Male	001523
Amitage, Elise	2	2GH		Female	001753
Atkins, Austin	2	2GH		Male	001800
Atkins, Eve	R	ELM		Female	001840
Atkins, Portia	3	3TO		Female	001653
Balan, Larisa	R	OAK		Female	001920

Select All  Deselect All

**Enter 'Not Required' codes**

Attendance required in mornings only
  Attendance required all day  
 Attendance required in afternoons only
  Apply a weekly pattern of Not Required codes

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

Highlight the required groups or pupils (using **Ctrl** and click to select multiple records). The **Select All** and **Deselect All** button can also be used if required.

Specify when attendance is required by selecting one of the radio buttons.

**Enter 'Not Required' codes**

Attendance required in mornings only
  Attendance required all day  
 Attendance required in afternoons only
  Apply a weekly pattern of Not Required codes

- 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 selected pupils are expected to attend Monday, Tuesday, Thursday and Friday mornings, and all day on Wednesday. It is important to note that the boxes that are checked refer to the sessions the pupil is **not required to attend**.

	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"/>

Click the **Apply** button to apply the codes to the selected part-time pupil/students.

## Update Free School Meal Eligibility Information

Go to the **Dietary Panel** of the Pupil Details screen and add any new start and end dates in the **Eligible for Free Meals** area – do not remove details of previous periods of eligibility.

## Run Housekeeping Routines

Go to **Tools > Housekeeping > General**

### 1. Name Format

This screen can be used to ensure that all the names in your SIMS system are in the same format.

**1 Name Format**

	UPPERCASE	Title Case
Apply To		
Students / Applicants <input type="checkbox"/>	Preferred Surname <input type="radio"/>	<input checked="" type="radio"/>
Staff <input type="checkbox"/>	Legal Forename <input type="radio"/>	<input checked="" type="radio"/>
Contacts <input type="checkbox"/>	Middle Name(s) <input type="radio"/>	<input checked="" type="radio"/>
Agents <input type="checkbox"/>	Preferred Forename <input type="radio"/>	<input checked="" type="radio"/>

Example: Peter John O'Malley-Smith Apply

When you have made your choice, click on **Apply**.

### 2. Reset Parental Ballot Flags

**2 Reset Parental Ballot Flags**

This routine marks contacts as eligible for the parental ballot if they are mothers or fathers of on-roll students (or have parental responsibility) on the effective date. All other contacts will be set as not eligible


Effective Date   Include accepted pre-admission students due to be on roll on the effective date? Apply

When you have made your choice, click on **Apply**.


### 3. Update Mailing Points

This screen is used to set the oldest or youngest sibling to act as a mailing point for the family, and thus make significant savings when sending communications home.

**2 Reset Parental Ballot Flags**  
 This routine marks contacts as eligible for the parental ballot if they are mothers or fathers of on-roll students (or have parental responsibility) on the effective date. All other contacts will be set as not eligible

Effective Date   Include accepted pre-admission students due to be on roll on the effective date?

**3 Update Mailing Point**  
 This routine identifies one pupil at each address as the mailing point. Other children at the same address will be marked as NOT the mailing point

Effective Date   Mailing Point

When you have made your choice, click on **Apply**.

### Update Parental Salutation and Addressee

Go to **Routines > Pupil > Update Parental Salutation/ Addressee > Parental**.

This screen can be used to ensure that all pupils have the Salutation and Addressee fields completed. Where there are blanks it indicates that investigation is required on the pupil record, such as ensuring that the Parental Responsibility box has been checked, or that addresses have been correctly entered.

### Check Exclude from Attendance – Schools with Nursery Year

Go to **Tools > Setups > Attendance Setup > Module Setup** and check panel 3 Exclude from Attendance. This menu route is used to exclude pupils not of statutory school age from Attendance reports. If the school has changed these dates in the past they will need to be amended in order to reflect the correct situation in the new academic year. This particularly refers to pupils moving from Nursery to Reception.

### Collect changes to Pupil/ Contact information

As soon as possible after the start of the new year, and in accordance with your school's data quality processes, send out the Data Collection Sheets to parents, asking that the information is checked, and any changes reported back to school. Those changes can then be entered in SIMS.

Alternatively, the student data can be made available to parents for checking via the Parent App – please contact Osmis for further details.